

CalPERS Supplemental Income 457 Plan

# PARTICIPANT CHANGE AUTHORIZATION FORM

Note to Employee: Check the boxes below for all that apply. Be sure to sign this completed form and submit to your Employer for processing.

CHANGE AMOUNT OF CONTRIBUTION       SUSPEND CONTRIBUTIONS  
 CATCH-UP PROVISION                       CHANGE IN MARITAL STATUS OR DOMESTIC PARTNERSHIP

Changes to your investment elections, including rebalancing your Plan account or requesting fund transfers, must be done by accessing your account on-line at <https://calpers.voya.com> or by calling the toll-free Plan Information Line at 1-800-260-0659. Investment fund changes submitted on this form will not be accepted.

Changes to your name and address, or corrections to your date of birth:

- If you are an active member, please submit your name and address changes, or date of birth corrections to your employer.
- If you are a retired or separated member, please submit your name and address changes, or date of birth corrections directly to CalPERS, toll-free, 888-CalPERS (225-7377).

## 1. PARTICIPANT INFORMATION (please print clearly)

NAME: \_\_\_\_\_ BIRTH DATE: \_\_\_\_\_  
LAST NAME FIRST NAME MIDDLE INITIAL

SOCIAL SECURITY NUMBER: - \_ - \_ \_ \_ \_ \_ CalPERS ID (optional): \_\_\_\_\_

EMPLOYER NAME: \_\_\_\_\_ AGENCY PLAN NUMBER: - \_ \_ \_ \_

WORK PHONE: \_\_\_\_\_ HOME PHONE: \_\_\_\_\_

E-MAIL ADDRESS: \_\_\_\_\_

## 2. CHANGE CONTRIBUTION AMOUNT

1. Check the box below, and enter the dollar amount or percentage of pay you currently contribute to the CalPERS Supplemental Income 457 Plan per pay period, and the dollar amount or percentage you want to contribute.

I hereby elect to change my Pre-tax contribution amount FROM \$ \_\_\_\_\_ or \_\_\_\_\_ % TO \$ \_\_\_\_\_ or \_\_\_\_\_ % per pay period.

I hereby elect to change my Roth contribution amount FROM \$ \_\_\_\_\_ or \_\_\_\_\_ % TO \$ \_\_\_\_\_ or \_\_\_\_\_ % per pay period.

I hereby elect to change my \_\_\_\_\_

#### 4. CATCH-UP PROVISION

1. If you are age 50 or older, you may take advantage of contributing more than the annual limit. Check the box indicating you will use the catch-up method.  
 I will be age 50 or older in the current tax year and am using the Age 50 Catch-up method.
2. The Special Catch-up Method may be used during the three tax years immediately preceding the tax year in which you have described your "normal retirement age."  
 Check the box indicating you will use this catch-up method.  
 Complete the separate form entitled "Special Catch-up Worksheet" to designate your "normal retirement age" and determine the amount of underutilized deferrals from previous years for which you are eligible to "catch-up" contributions.  
 I am using the Special 457 Catch-up method and have completed the Special 457 Catch-Up Method Worksheet.

#### 5. CHANGE IN MARITAL STATUS OR DOMESTIC PARTNERSHIP

I am legally married or in a domestic partnership.

I am not married or in a domestic partnership.

Please indicate:

Divorced  Widowed  DP-Terminated

#### 6. SIGNATURES REQUIRED

PARTICIPANT'S SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

EMPLOYER'S SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

Note to Employer: Be sure this form is signed by both the participant and the employer. Please submit this completed form by fax or mail.

FAX DELIVERY:  
Voya Financial  
Attn: CalPERS  
1-888-228-6185

US MAIL DELIVERY:  
Voya Financial  
Attn: CalPERS  
P.O. Box 389  
Hartford, CT 06141

OVERNIGHT DELIVERY:  
Voya Financial  
Attn: CalPERS  
One Orange Way  
Windsor, CT 06095

If you have any questions, you may call the Help Line at 1-800-260-0659, or to obtain additional plan or account information, please visit our website at <https://calpers.voya.com>. Customer Service Representatives are available Monday through Friday, 6:00 A.M. to 5:00 P.M. (excluding stock market holidays).