

## Departments in Plan

## Summary Plan Description

### III- Department of Mental Health

**Plan Type**

Internal Revenue Code  
Section 403(b)

**Plan Administrator**

CalSTRS 403bComply

**Excluded Employees**

Employees who do not work for an Employer that meets the definition in Regulation Section 1.403(b)-2(b)(8)(i) and/or Employees who do not meet the definition of Section 1.403(b)-2(b)(9) and (ii) No Employees of the State Hospital shall be eligible to contribute to the Plan after February 1, 2010

**Plan Password for Enrolling Online**

plan3403

**Written Plan Effective Date**

1/1/2009

**Plan Year End**

12/31

**Contribution Tax Treatment**

Pre-Tax

**Contribution Sources**

Employee

**Roth 403(b)**

Not Available

**Contribution Limit**

\$16,500 per year

**Catch-Up Contribution Limit**

Available for age 50 + catch up

**Automatic Enrollment**

Not Available

**Exchanges in Plan**

Available only with companies listed in Appendix I & II

**Transfers Into Plan**

Available from another employers 403(b) plan

**Transfers Out of Plan**

Not Available

**Distributions**

Available under the following conditions:  
Separation of Service, Death, Disability, or Retirement

**Loans**

Available, subject to availability and any additional conditions applied by individual vendors

**Automatic Distributions**

Not available

**Hardship**

Available if request meets IRS definition pursuant to § 1.401(k)-1(d)(3)(iii)(B) of the Income Tax Regulations

**Disability**

Designated by each vendor and **not** by the 403(b) plan.

**Beneficiaries**

Designated by each vendor and **not** by the 403(b) plan.

**Administrative Fees**

\$2.00 per 403(b) participant per

**Fees Paid By:**

Employer

month

**For more information please contact CalSTRS 403bComply, the Plan Administrator**

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