

## Departments in Plan II- Summary Plan Description

the Department of Corrections & Rehabilitation, Division of Education, Vocations Offenders Programs, Office of Correctional Education (Adult)

### 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)

### Plan Password for Enrolling Online

plan2403

### 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 month

### Fees Paid By:

Employer

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

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