

Carpinteria USD

Summary Plan Description

Plan Type

Internal Revenue Code
Section 403(b)

Plan Administrator

CalSTRS 403bComply

Excluded Employees

Non Board approved employees

Plan Password

car403ER

Written Plan Effective Date

11/1/2011

Plan Year End

12/31

Contribution Tax Treatment

Pre-Tax

Contribution Sources

Employer

Roth 403(b)

Not Available

Vesting

Contributions are 100% vested

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

Disability

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

Beneficiaries

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

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

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