

CALSTRS

403bComply

Compliance & Administration Solutions

Spring 2011 Newsletter

403(b)



Annual Contribution Limits for 2011 Tax Year

For 2011, 403(b) participants are allowed to contribute 100% of their annual compensation to their plans – up to \$16,500. Participants over the age of 50 are allowed to contribute an additional \$5,500.

403(b) Approved Vendors

Isn't it time you had a 403(b)? We can help you open a new account, or even replace an old one. You can find the most complete up-to-date list of approved 403(b) vendors on the CalSTRS 403bComply website under the "403(b) Vendors" tab.

What's New at CalSTRS 403bComply:

It's now even easier to manage your 403(b) contribution online! As a part of our ongoing efforts to make our website as user-friendly as possible, CalSTRS 403bComply has launched a new login screen for 403(b) participants.

These changes were based on the valuable input of our clients and are designed to simplify the login process for both new and returning website users. Instead of logging in as a "new" or "current" participant, you will simply need to locate your website "status" from the short list on the login screen and follow the corresponding instructions. This new login process eliminates steps and makes it easier for you to make changes to your 403(b) account.

www.calstrs403bcomply.com
(888) 892-7494

Navigating the CalSTRS403bComply.com Website: DISTRIBUTIONS

Life is full of changes - new jobs and layoffs, marriages and divorces, births and deaths. For better or worse, many of these changes directly impact your financial situation. If a change in your life creates a need to access the funds in your 403(b) account through a loan, hardship withdrawal, transfer, rollover, or exchange, please visit www.calstrs403bcomply.com/request to find instructions on the proper steps to take in making a request. Through a simple four-step process you can expedite your request quickly and easily.