



Lump Sum Separation Pay Contribution Election Form

(855) 616-4776

savingsplusnow.com

Submit this completed Form to your personnel office 30 days prior to separation from service so as to accommodate necessary discussions that may impact timely completion of the paperwork. Note that forms must be received at least five (5) workdays (Monday through Friday, excluding Saturdays, Sundays and legal holidays) prior to separation. Be sure to keep a copy for your records.

SECTION 1: PARTICIPANT INFORMATION

Last Name, First Name, MI	
Mailing Address	
City, State, ZIP	Daytime Telephone Number
Separation Date (mm/dd/yyyy)	Alternate Contact Telephone Number
Please provide your primary email address so that your department can contact you.	

SECTION 2: PARTICIPANT INFORMATION

Write the amount you choose to contribute to your Savings Plus account from your Lump Sum Separation Pay in the relevant boxes below. If you were approved for 457(b) Traditional Catch-Up, be sure to include the amount in the 457(b) totals and attach your approval letter. If you are contributing for two tax years, list the totals for each year below. Only one form is needed if contributing across two tax years.

Plan Year	401(k)		457(b)	
	Pre-tax	Roth	Pre-tax	Roth
	\$	\$	\$	\$
	\$	\$	\$	\$

Your Lump Sum Pay may not be sufficient to contribute the maximum to both plans and/or across both tax years. Please indicate the priority order for SCO to process your contributions, using the priority column in the table above, with 1 being first priority, then 2, 3, etc.

Note: If you do not know the amount of your accumulated leave time, write in the maximum dollar amount allowable for each plan year that applies to you. If you are using Traditional Catch-Up or age-based catch-up, include the allowable amount in the totals above.

I request a contribution of Lump Sum Separation Pay in accordance with my choice above and California Labor Code Sections 201(b) and 202(b). I take full responsibility for providing my request to my personnel office five (5) workdays prior to my separation date and understand the terms and conditions of deferring all or a portion of my Lump Sum Separation Pay. I have verified my request prior to submission and understand that changes will not be accepted after the five-day threshold has passed. If applicable, I have attached a copy of my Traditional Catch-Up Approval Letter.

I hereby certify under penalty of perjury that the information on this form is true and accurate to the best of my knowledge.

Signature	Date
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Need help or have questions? Contact the Savings Plus Solutions Center at (855) 616-4776 or visit savingsplusnow.com/lumpsum for FAQs and tutorials.

Personnel Office Use Only

Refer to SCO personnel letters applicable to Lump-Sum Separation Pay for instructions on completing the separation PAR. Attach this request with a copy of the separation PAR and, if applicable, the Traditional Catch-Up Approval Letter from the employee. Retain a copy with the employee file. Do not submit a copy to Savings Plus.

California Department of Human Resources Privacy Notice on Information Collection (rev. 7/16)

This notice is provided pursuant to the Information Practices Act of 1977. The California Department of Human Resources (CalHR) Savings Plus Program is requesting the information specified on this form pursuant to California Government Code Sections 19993 and 19999.5. The information collected will be used for identification of your account and will be disclosed to the Savings Plus Administrative Services Provider (Nationwide) for processing of your request as indicated on the form. Individuals should not provide personal information that is not requested or required. The submission of all information requested is mandatory unless otherwise noted. If you fail to provide the information requested, CalHR will not be able to process the action(s) indicated on the form as requested.

Department Privacy Policy

The information collected by CalHR is subject to the limitations in the Information Practices Act of 1977 and state policy. For more information on how we care for your personal information, please read our Privacy Policy at calhr.ca.gov/pages/privacy-policy.aspx.

Access to Your Information

The CalHR Privacy Officer is responsible for maintaining collected records. You have a right to access records containing your personal information that we maintain. To request access, contact: CalHR Privacy Officer, 1515 S Street 400N, Sacramento, CA 95811 / (916) 324-0455 / CalHRPrivacy@calhr.ca.gov

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