Your Savings Plus Essentials

At Savings Plus, we like to make your job a little easier; therefore, we created this Savings Plus Essentials form. To ensure you have the most current information to provide to your employees, we can send the items below directly to you. Simply fill out the form and return it to the contact listed below.

For more information on Savings Plus, visit **savingsplusnow.com**.

Item	Quantity	Date Needed by
Enrollment Form		
Enrollment Guide		
Plan Comparison Chart		
Contribution Change Form		
Future Value Calculator		
Know Your Retirement Benefits (CalHR Savings Plus and CalPERS comparison)		
Savings Plus Representative Maps		
Traditional Catch-Up Guide		
Traditional Catch-Up Form		
Beneficiary Designation Form		
Loan Fact Sheet		
Rollover-In Form		
PST Fact Sheet		
Leave Time Contribution Options (Lump Sum)		
Who We Are Flier		
Ready to Retire Brochure		
Your Savings Plus Essentials Order Form		

Recipient Information:

Name of contact person/recipient (Please print)

Department

Mailing Address or inter office mail location

City, State, ZIP code

Daytime Telephone Number

(   )

Return to:

Taylor Schultze

Savings Plus
1515 S St., North Building, Ste. 500
Sacramento, CA 95811

Phone: (916) 324-0535

Fax: (916) 327-1885

Taylor.Schultze@calhr.ca.gov

More resources from Savings Plus

Workshops

We provide a series of educational workshops to help you and your employees get the most out of your Savings Plus account. See below for the list of current workshops we offer.

- Lump Sum Separation Pay and 457(b) Traditional Catch-Up*
- Enrolling in Savings Plus*
- Investing with Savings Plus
- Nearing Retirement*
- Social Security: The Choice of a Lifetime

*Webinars offered

For the most up-to-date list of workshops or to register, visit **savingsplusnow.com** and click on Savings Plus events at the bottom of the home page.

To schedule a workshop at your location, contact the licensed Retirement Specialist in your area.

Outreach Events

Our team will come to you! We can provide you with New Employee Orientation (NEO) training in the convenience of your office. To schedule one of these classes, please email us at spptraining@calhr.ca.gov.

We also offer the new Savings Plus On-site Service Day!

Savings Plus will visit your department from 9 a.m. to 4 p.m. to provide your employees a one-on-one appointment with a licensed Retirement Specialist during one of their 15 minute breaks. These appointments will be pre-scheduled through an email sent to the department prior to the event. We'll also host a workshop from 12 p.m. to 1 p.m. in a conference room at your facility. Additionally, we'll provide a table with our literature and Savings Plus employees will be available to answer any questions throughout the day. If you're interested in having a Savings Plus On-site Service Day at your location, please contact Taylor.Schultze@calhr.ca.gov.

Online Support

At **savingsplusnow.com** you can:

- Find all forms and materials
- Locate the licensed Retirement Specialist in your area
- Watch testimonial videos from state workers about their experience with Savings Plus and hear from our staff highlighting features of our program
- Use My Interactive Retirement Planner
- Use the Paycheck Impact Calculator
- Use My Investment Planner

Contact Information

Website
savingsplusnow.com

Savings Plus Service Center
(855) 616-4776
(800) 848-0833 (TTY)
5 a.m. - 8 p.m. PT

Savings Plus Walk-in Center
1810 16th Street, Room 108
Sacramento, CA 95811
8 a.m. - 5 p.m. PT

savingsplus
CALIFORNIA STATE EMPLOYEE 401(k) & 457(b) PLANS

Go to **savingsplusnow.com** to locate the licensed Retirement Specialist in your area. We provide hands on support.

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