

# 403b & 457

# Tax Sheltered Annuities New Accounts and Rollovers

## New Accounts

Select a vendor from the District's vendor list found at the District website under **Human Resources > Benefits > Deferred Compensation**

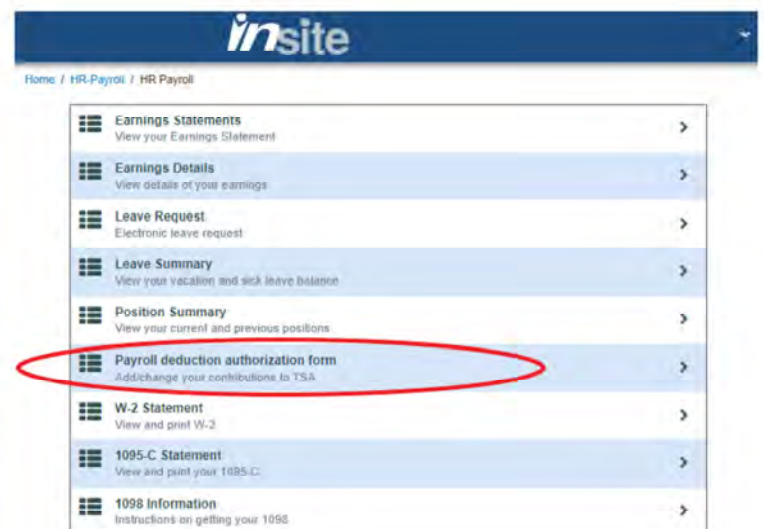
Contact the vendor and request enrollment forms.

Complete the enrollment forms and establish an account.

When establishing the account, provide the vendor with the District code found on the vendor list. CalPERS 457 plans must be signed by district plan administrator.

## Start & Change Contributions

Complete the Payroll Deduction Authorization form found on the InSite Portal under the HR-Payroll Tile



## Direct Rollover and Loan Authorization

Please contact your existing vendor directly for information and to begin the process. They will provide you directions and paperwork that you will need to complete. Once your paperwork is ready to be signed by the Plan Administrator please send it to the district office via interoffice mail, USPS, or for quicker response you may email the forms to [DOPQ@email.4cd.edu](mailto:DOPQ@email.4cd.edu)