#### ScholarShare College Savings Plan

## **California State Employee Payroll Deduction Form**

(excluding University of California and State Senate or Assembly)



- The employee must be the Account Participant or the Custodian for a Minor.
- Complete this form to establish, change or cancel Payroll Deduction instructions on your ScholarShare account(s).
- If you do not already have an account in the Plan, you will need to establish an
   Account at ScholarShare529.com or complete an Account Application and mail
   it with this form.
- Payroll Deduction Instructions contained in this form will replace any previous instructions on file for the accounts listed below. To contribute to a new account and/or portfolio, you must include all of your existing Beneficiary account(s) and portfolio(s) on this form.
- Type in your information and print out the completed form, or print clearly, preferably
  in capital letters and black ink. Mail the form to ScholarShare College Savings
  Plan, P.O. Box 219185, Kansas City, MO 64121-9185. Do not staple.

To request assistance in completing this form call us at **1.800.544.5248**, Monday through Friday from 8 a.m. – 7 p.m. PT.



www.ScholarShare529.com

Regular mailing address:

ScholarShare College Savings Plan P.O. Box 219185 Kansas City, MO 64121-9185

Overnight mailing address:

ScholarShare College Savings Plan 920 Main Street, Suite 900 Kansas City, MO 64105-2017

# 1. State Employee Information

<b>Note:</b> The employee must be the Account Participa	nt	
Account Number		
Employee Name (First name)		(M.I.)
Employee Name (Last name)		
Social Security Number		
Employee Telephone Number (In case we have a question abo	ut your Account.)	
State Agency		
Payroll Department Contact Name	Telephone Number	Extension (if any)



### DO NOT STAPLE

2.	<b>Payroll Deduction Instructions</b>	5
	Check one: Start Payroll Deduction	1

Check one: Start Payroll Deduction Change Amount Stop Payroll Deduction (Skip to Section 3)	
Deduct \$,, 0 0 from my paycheck (on an after-tax basis) each pay period and allocate the amount among my <b>ScholarShare College Savings Plan</b> Accounts as detailed below.	
Please use an additional sheet if you have more than four Accounts.	
S,O O  Account Number  Dollar Amount	
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Beneficiary (First name)	1.1.)
Beneficiary (Last name)	_
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Account Number Dollar Amount	
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Account Number  Dollar Amount	
	$\neg$
Beneficiary (First name)	1.1.)
	/
Beneficiary (Last name)	

### 3. State Employee Authorization and Signature — YOU MUST SIGN BELOW

I understand that the payroll deduction amount deposited into my ScholarShare account(s) will be reduced by the collection of a nominal charge per pay period as required by the State Controller's Office. For the current rate, refer to the Miscellaneous — File Transfer charge at https://sco.ca.gov/ppsd\_ded\_charges.html.

I certify that I have read and understand, consent, and agree to all the terms and conditions of the ScholarShare College Savings Plan Description and understand the rules and regulations governing the **ScholarShare College Savings Plan**. Further, I understand that none of the ScholarShare College Savings Plan, the State of California, the ScholarShare Investment Board, TIAA-CREF Tuition Financing, Inc., Ascensus College Savings Recordkeeping Services, LLC and its affiliates are responsible for any claims I may make and/or losses resulting from my employer's failure to timely and accurately process my contributions via payroll direct deposit. This authorization will remain in effect until cancelled by me or by ScholarShare, or upon termination of my employment with the State of California.

SIGNATURE	
Signature of State Employee	Date (mm-dd-yyyy)

#### **State Employee Checklist**

Use this checklist to help you establish payroll deduction for your Plan Account(s). Read it carefully **before** completing this form.

- Be sure to include your Social Security Number or Taxpayer Identification Number in Section 1.
- Be sure that your total allocation equals 100%.
- Make a copy of this completed form for your records.
- Questions? Call toll-free 1.800.544.5248, Monday through Friday from 8 a.m. 7 p.m. PT.

