



## 5 UC Employee Authorization and Signature

I understand that my Account(s) will not be credited with my payroll deduction until the funds are received in good order by the Plan and that date on my payroll stub may not be the same date the deposit is credited to my Account(s). I further understand that there may be a nominal fee charged by the employer for the payroll deduction. This authorization will remain in effect until cancelled by me or by ScholarShare, or upon termination of my employment with the University of California.

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UC Employee Signature

Date

### UC Employee Checklist

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

**Mail it to the Plan at the address that appears below.**

- ✓ Include your Social Security Number or Taxpayer Identification Number, Employee ID Number and Location Code in Section 2.
- ✓ Use this chart to find your Location Code.

ELIGIBLE LOCATIONS	INELIGIBLE LOCATIONS
01 – Berkeley 02 – San Francisco 03 – Davis 04 – Los Angeles (1) 05 – Riverside 06 – San Diego 07 – Santa Cruz 08 – Santa Barbara 09 – Irvine 10 – Merced 97 – ASUCLA (2) 98 – Hastings College of Law	94 – Lawrence Berkeley National Laboratory (3) 95 – Lawrence Livermore National Laboratory (3)
	NOTES
	(1) Including UCOP employees paid from UCLA. (2) UCLA employees use code 04.

- ✓ Be sure that your total allocation equals 100%.
- ✓ Use the list below to select one or more of the following Investment Portfolios for each Account you own in Section 4.

Investment Portfolio Names (Portfolio numbers)		
Active Age Based Portfolio	Passive Age Based Portfolio	Index International Equity Portfolio (2951)
Active Diversified Equity Portfolio (2929)	Passive Diversified Equity Portfolio (2945)	Social Choice Portfolio (2933)
Active Growth Portfolio (2930)	Passive Growth Portfolio (2946)	Index Bond Portfolio (2950)
Active Moderate Growth Portfolio (2931)	Passive Moderate Growth Portfolio (2947)	Index U.S. Large Cap Equity Portfolio (2952)
Active Conservative Portfolio (2932)	Passive Conservative Portfolio (2948)	Index U.S. Equity Portfolio (2953)
Active Diversified Fixed Income (2935)	Passive Diversified Fixed Income Portfolio (2949)	Principal Plus Interest Portfolio (2954)
Active International Equity Portfolio (2934)		

- ✓ **Important:** If you are not the Participant, you must obtain the ScholarShare account number(s) from the Participant and provide the account number(s) for each Beneficiary in Section 4. If you do not include the account number(s), ScholarShare will be unable to credit your deductions to the account(s).
- ✓ Make a copy of this completed form for your records.
- ✓ **Questions?** Call toll-free 1 800 544-5248 (Monday – Friday from 8:00 a.m. – 7:00 p.m. PT).

**Mail this form to:**

**Overnight Mail**  
ScholarShare College Savings Plan  
430 W 7<sup>th</sup> Street Suite 219185  
Kansas City, MO 64105-1407

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

