



## 5 State Employee Authorization and Signature *(You must sign exactly as your Account is registered.)*

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](https://sco.ca.gov/ppsd_ded_charges.html). I understand that my ScholarShare Account(s) may not be credited with my payroll deduction until the funds are received from the State Controller's Office and that date on my payroll stub may not be the same date the deposit is credited to my Account(s). This authorization will remain in effect until cancelled by me or by ScholarShare, or upon termination of my employment with the State of California.

State Employee Signature

Date (Month/Date/Year)

### 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 and Employee ID Number in Section 2.
- ✓ Be sure that your total allocation equals 100%.
- ✓ Use the list below to select one or more Investment Portfolios for each Account you own in Section 4.

Investment Portfolio Names <i>(Portfolio numbers)</i>		
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 5:00 a.m. – 8:00 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

