CalSTRS 403bComply Enrollment Instructions

RECOMMENDED BROWSER FOR A PC IS INTERNET EXPLORER
RECOMMENDED BROWSER FOR A MAC IS SAFARI

These are instructions for first time users creating a CalSTRS 403bComply account. Existing users will find this document helpful because the website has been updated, and this will walk you through those new screens.

TRADITIONAL CalSTRS 403bComply: This plan automatically deducts part of your salary into the retirement savings plan before taxes are taken out. The money grows tax-deferred until it's withdrawn, and then the taxes come due.

REMODULE: You can have both a traditional and a CalSTRS Roth 403bComply account—and contribute to one or both at the same time—if allowed by your plan.

NEW AND EXISTING USERS, START HERE.

1. Go to www.calstrs403bcomply.com to set up your salary deferral (contribution amount) and allocation. Click Login.

2. From the navigation bar, select the first letter of your district’s name. We are using Tulare COE as our example.
3. Select your district’s name. We are using Tulare COE as our example.

Your Plan Password can be found on the Plan Description here.

4A. **NEW USERS** select 403(b), then select Register.

4B. **EXISTING USERS** select Login.

Then go to Step 8 on Page 4

5. **NEW USERS** enter your (case sensitive) Plan Password; click NEXT.

(Refer to Step 3 if you do not know your Plan Password.)
6. Create your Username and Password; enter all personal information; then click NEXT.

7. Investment Elections—Click Employee Deferral to reveal your investment choices.

NEW USERS skip next page.
Go to Step 8 on page 5.
5. **EXISTING USERS** enter your **Username** and **Password**; then select **LOGIN**.

6A. Click **Manage Investments** to **view or change** your current elections.

6B. This screen reveals your current 403(b) investment choices. To change amounts or vendors, click **GET STARTED**.

7. Now click **Employee Deferral** to reveal all 403(b) investment funds offered.
8. Next apply the dollar amount of your contribution to the investment(s) of your choice. Once you are satisfied with your choices and your total at the bottom of the page equals your per-paycheck deduction, click the **I authorize** box.

Then click **NEXT**.

Click SUBMIT when you are satisfied.

10. Well done! You are finished! Your six-digit Confirmation Number will be emailed to you.

Please note: Your contribution may be cancelled if you have not set up an account with the vendor(s). To review your vendor registrations, click here.