Contra Costa Community College District

Easy steps to a 403(b) Tax Sheltered Annuity

Please Note: These instructions do not pertain to the CalPERS Supplemental Income 457 Plan or the CAISTRS Pension 2 Personal Wealth Plan 403(b) that require separate enrollment forms found at the District website under Deferred Compensation.

New Accounts and Rollover Instructions

A few easy steps:

1. Select a vendor from the District’s vendor list of Tax Sheltered Annuity 403(b) companies found at the District website under Human Resources, Benefits, and Deferred Compensation.

2. Contact the 403(b) company to receive enrollment forms.

3. Complete the paperwork from the 403(b) company to establish an account with the 403(b) company.

4. When rolling an account over or establishing a new account, provide the 403(b) company with the District code found on the vendor list in step 1.

5. Complete the Payroll Deduction Authorization form found at the District website under Human Resources, Benefits, and Deferred Compensation.

6. Submit the Payroll Deduction form to the District Office Payroll Department at 500 Court Street, Martinez, CA 94553.

7. Attach a copy of the confirmation number from the 403(b) company to the Payroll Deduction form showing the account was established.

8. To establish additional accounts with 403(b) companies, repeat the steps above.