

Employee Information	Employee Name	Social Security Number	
	E-Mail Address	Certificated	Classified
	Name of District	County	
	Date of Birth	Date of Hire	
457(b) Catch-up	<p>Special 457(b) Catch-up Provision. <i>The Special 457(b) catch-up provision may allow a participant to contribute up to twice the standard annual limit for the 3 consecutive years prior to becoming eligible for FULL Retirement benefits under the PERS and STRS retirement systems.</i></p>		
CalSTRS or CalPERS Please check one	<input type="checkbox"/> CalSTRS: Participants may use the 457(b) special catch-up provision the years in which they turn 57, 58, and 59 if hired on or before 12/31/2012 or ages 59, 60, and 61 if hired on or after 1/1/2013. <input type="checkbox"/> CalPERS/Other: Please attach your defined benefit plan statement for us to review to determine eligibility.		
457(b) Calculations	1. 457(b) Annual Deferral Limit	1. \$19,500.00	
	2. Will you reach age 50 or older by 12/31/21	2. Yes No	
	a. If you will be age 50 or older by 12/31/21, enter \$6,500 on line 2a. If not, enter \$0	2a.	
	3. (Complete Page 2). Over 50 catch-up cannot be used in conjunction with the Special 457(b) Catch-up. Enter amount calculated using page 2, <i>The 457(b) Worksheet</i> *	3. <i>*Please Do Not Skip</i>	
	4. Add lines 1 and the greater of line 2(a) or 3. Enter total on line 4. This is your total Maximum 457(b) Contribution Amount for 2021. 2021 Maximum Contribution total cannot exceed \$39,000.	4.	
	5. Enter the total of any contributions already made to a 457(b) plan during 2021.	5.	
6. Subtract line 5 from line 4. This is the total remaining amount you may contribute to a 457(b) in 2021.	6.		
Employee Signature	<p>IMPORTANT: You may rely on the accuracy of this worksheet if the information you provide is correct and complete. Neither SchoolsFirst Plan Administration nor your Employer has pre-2021 data for purposes of calculating the 457(b) Type "B" Catch-Up Contribution. Please make sure the information you provide is correct. By signing this worksheet, you certify that all the information provided is accurate and you agree to indemnify and hold harmless SchoolsFirst Plan Administration and your Employer from any and all damages which may result from providing inaccurate or incomplete information. You understand that this election of a Special Catch-up contribution to any 457(b) is a one-time option.</p>		
	Employee Signature:	Date:	

Employee Name: _____	Social Security #: _____
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Please follow the instructions below to determine your Underutilized Deferrals

Instructions: Begin with the first year you became eligible to participate in a 457(b) Plan.

1. In column 1 enter your gross compensation or the amount of your gross compensation multiplied by the percentage listed in each particular box.
2. In column 3, enter the lesser of the amount in column 1 or 2.
3. In column 4, list the actual contribution to the 457(b) plan.
4. In column 5, place the amount contributed to another 457(b), 403(b) or 401(k) for years prior to 2002.
5. For each row used, take the amount in column 3 and subtract columns 4 and 5 to calculate column 6.

Year	1 Gross Compensation	2 457(b) Contribution Limit	3 Lesser of column 1 or 2	4 Actual Contributions to 457(b) Plan, excluding Age 50 Catch-Up contributions	5 Contribution to another 457(b), 403(b) or 401(k) for years prior to 2002	6 Underutilized Amount (column 3 minus columns 4 & 5)
1982	33.3% x \$ _____ = \$ _____	\$7,500	\$ _____	\$ _____	\$ _____	\$ _____
1983	33.3% x \$ _____ = \$ _____	\$7,500	\$ _____	\$ _____	\$ _____	\$ _____
1984	33.3% x \$ _____ = \$ _____	\$7,500	\$ _____	\$ _____	\$ _____	\$ _____
1985	33.3% x \$ _____ = \$ _____	\$7,500	\$ _____	\$ _____	\$ _____	\$ _____
1986	33.3% x \$ _____ = \$ _____	\$7,500	\$ _____	\$ _____	\$ _____	\$ _____
1987	33.3% x \$ _____ = \$ _____	\$7,500	\$ _____	\$ _____	\$ _____	\$ _____
1988	33.3% x \$ _____ = \$ _____	\$7,500	\$ _____	\$ _____	\$ _____	\$ _____
1989	33.3% x \$ _____ = \$ _____	\$7,500	\$ _____	\$ _____	\$ _____	\$ _____
1990	33.3% x \$ _____ = \$ _____	\$7,500	\$ _____	\$ _____	\$ _____	\$ _____
1991	33.3% x \$ _____ = \$ _____	\$7,500	\$ _____	\$ _____	\$ _____	\$ _____
1992	33.3% x \$ _____ = \$ _____	\$7,500	\$ _____	\$ _____	\$ _____	\$ _____
1993	33.3% x \$ _____ = \$ _____	\$7,500	\$ _____	\$ _____	\$ _____	\$ _____
1994	33.3% x \$ _____ = \$ _____	\$7,500	\$ _____	\$ _____	\$ _____	\$ _____
1995	33.3% x \$ _____ = \$ _____	\$7,500	\$ _____	\$ _____	\$ _____	\$ _____
1996	33.3% x \$ _____ = \$ _____	\$7,500	\$ _____	\$ _____	\$ _____	\$ _____
1997	33.3% x \$ _____ = \$ _____	\$7,500	\$ _____	\$ _____	\$ _____	\$ _____
1998	33.3% x \$ _____ = \$ _____	\$8,000	\$ _____	\$ _____	\$ _____	\$ _____
1999	33.3% x \$ _____ = \$ _____	\$8,000	\$ _____	\$ _____	\$ _____	\$ _____
2000	33.3% x \$ _____ = \$ _____	\$8,000	\$ _____	\$ _____	\$ _____	\$ _____
2001	33.3% x \$ _____ = \$ _____	\$8,500	\$ _____	\$ _____	\$ _____	\$ _____
2002	\$ _____	\$11,000	\$ _____	\$ _____		\$ _____
2003	\$ _____	\$12,000	\$ _____	\$ _____		\$ _____
2004	\$ _____	\$13,000	\$ _____	\$ _____		\$ _____
2005	\$ _____	\$14,000	\$ _____	\$ _____		\$ _____
2006	\$ _____	\$15,000	\$ _____	\$ _____		\$ _____
2007	\$ _____	\$15,500	\$ _____	\$ _____		\$ _____
2008	\$ _____	\$15,500	\$ _____	\$ _____		\$ _____
2009	\$ _____	\$16,500	\$ _____	\$ _____		\$ _____
2010	\$ _____	\$16,500	\$ _____	\$ _____		\$ _____
2011	\$ _____	\$16,500	\$ _____	\$ _____		\$ _____
2012	\$ _____	\$17,000	\$ _____	\$ _____		\$ _____
2013	\$ _____	\$17,500	\$ _____	\$ _____		\$ _____
2014	\$ _____	\$17,500	\$ _____	\$ _____		\$ _____
2015	\$ _____	\$18,000	\$ _____	\$ _____		\$ _____
2016	\$ _____	\$18,000	\$ _____	\$ _____		\$ _____
2017	\$ _____	\$18,000	\$ _____	\$ _____		\$ _____
2018	\$ _____	\$18,500	\$ _____	\$ _____		\$ _____
2019	\$ _____	\$19,000	\$ _____	\$ _____		\$ _____
2020	\$ _____	\$19,500	\$ _____	\$ _____		\$ _____
TOTAL UNDERUTILIZED AMOUNT						\$ _____
ENTER THE LESSER OF \$19,500 ON YOUR TOTAL UNDERUTILIZED AMOUNT. THIS IS YOUR 457(b) CATCH-UP AMOUNT						\$ _____