



CALSTRS®

# Retirement Readiness

Member Education and Stakeholder Engagement

# Benefits Planning Through the Years



CONTRACTED  
OFFICES  
PLANNING SERVICES



CONTRACTED OFFICES  
&  
TELEPHONE SESSIONS



MEMBER SERVICE  
CENTERS  
&  
ENHANCED EDUCATION  
MODEL



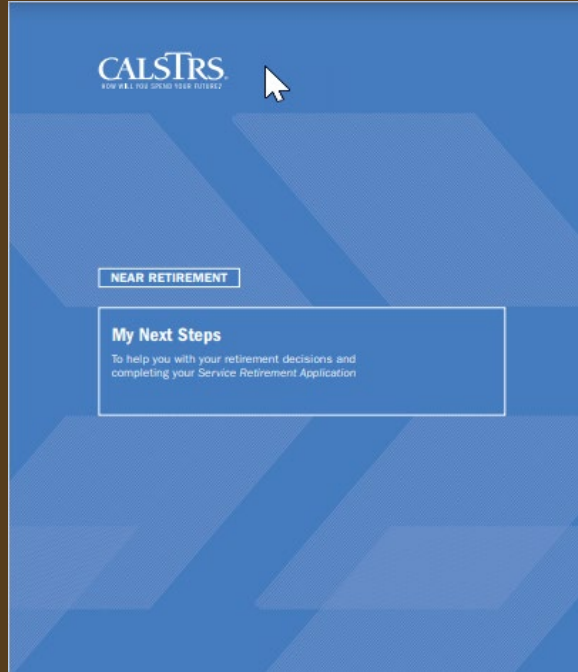
ADAPTED VIRTUAL  
SERVICES  
PAPERLESS  
PREPARATION



BACK INTO OFFICES  
SIMULCAST SERVICES  
IN PERSON  
VIRTUAL

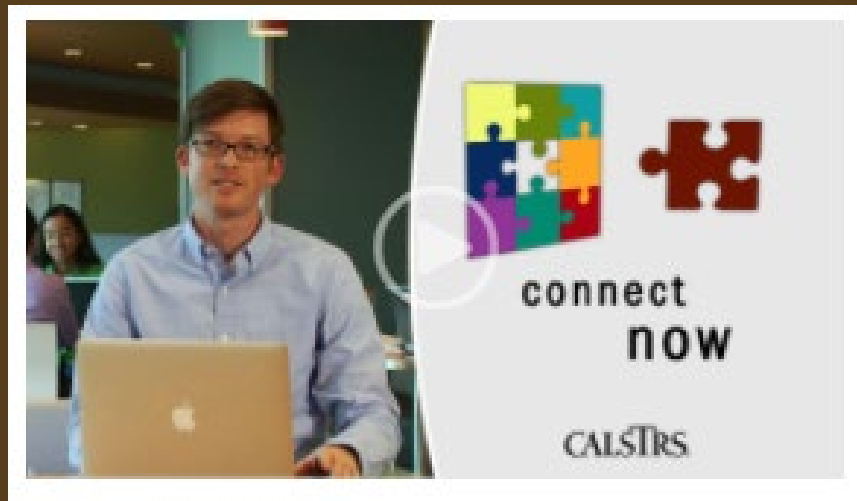


# Member Education Model

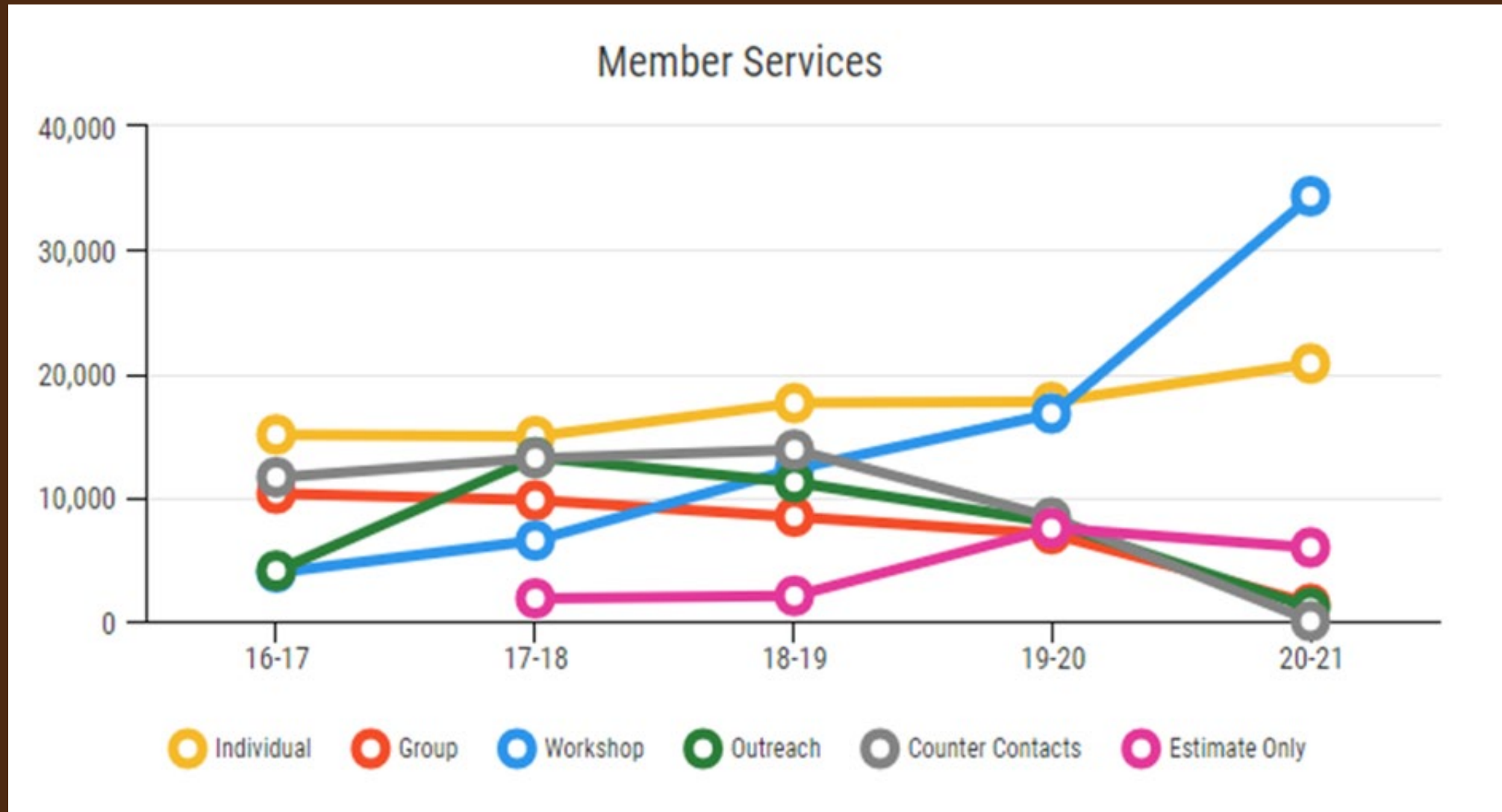


## Engagement & Tools

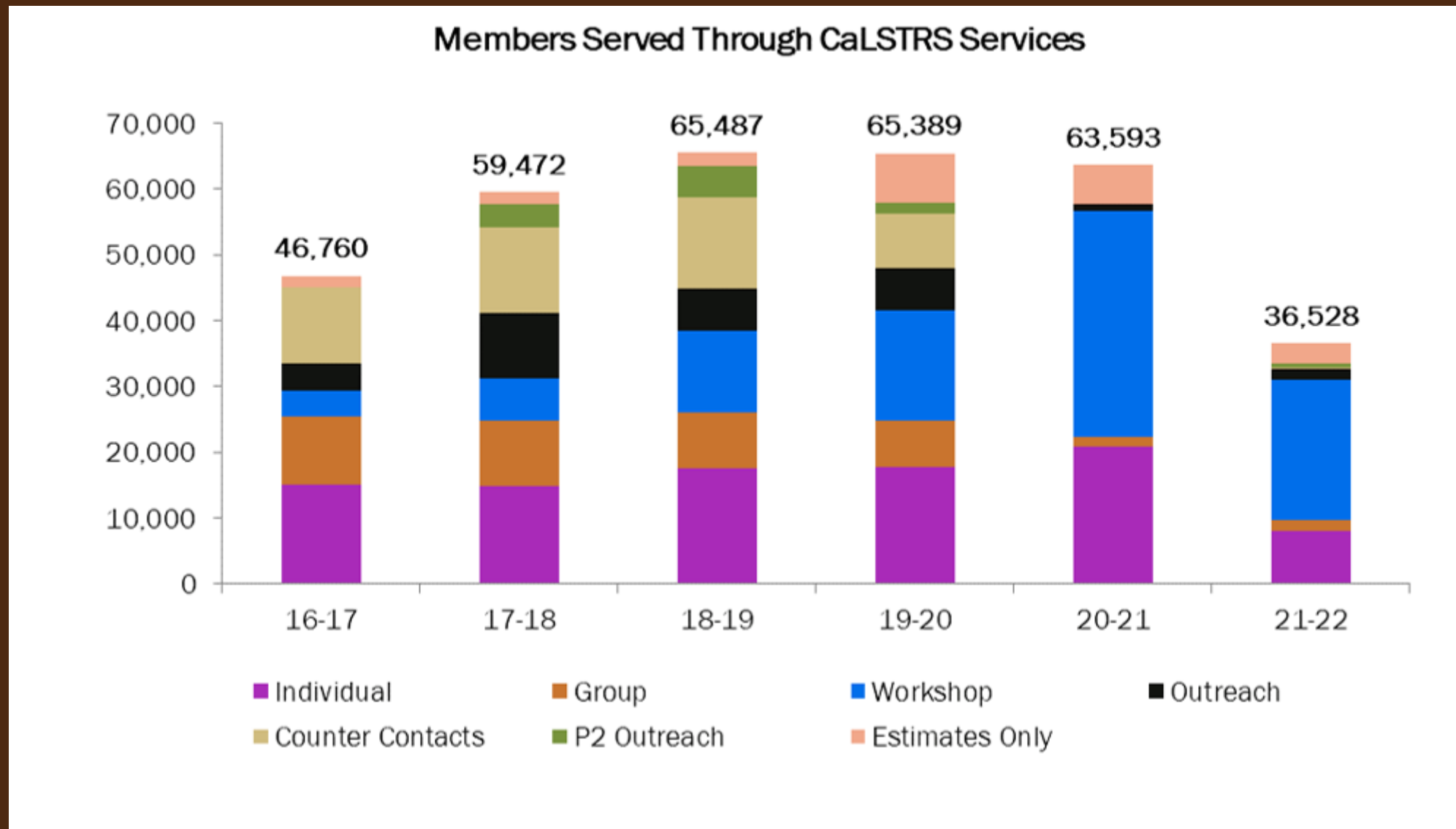
- My Next Steps
- Outreach and Events
- Educational Videos
- 403(b) Compare
- Enhanced Pension2 Education



# Member Services



# Members Served



# Our Members' Journey – Career Pages

## Early career

CalSTRS is your retirement plan. We're here for you. Take a few minutes to learn more about your benefits and steps you can take now for your secure future.



## Near retirement

You've been a member with us for some time now. You may be aware of all the resources that CalSTRS offers – if not, this page is just for you.

CalSTRS offers many ways to learn about your benefits, including tools, resources and services to assist you throughout the planning process.



## Midcareer

You've been a member with us for some time now. You may be aware of all the resources that CalSTRS offers – if not, this page is just for you.

CalSTRS offers many ways to learn about your benefits, including tools, resources and services to assist you throughout the planning process.



## Retired educator

CalSTRS is here to support you in retirement. Take a few minutes to learn more about your benefits and the services available to you as a retired member. Explore our videos, attend a workshop or take part in our annual Retired Educator Event.

If you aren't already registered, make sure to sign up for [myCalSTRS](#) so you can stay in touch.



## Part-time educator

CalSTRS is your retirement plan. We're here for you. Take a few minutes to learn more about your benefits and steps you can take now for your secure future.





# New Educator and Prospective Member Efforts

- CalSTRS
- Ed Join
- CalPERS

CalSTRS Teacher Posting (Do Not Apply)

CodeStack Training Specialist

Application Deadline: 7/24/2021 11:59 PM Pacific  
Date Posted: 7/28/2021  
Contact: Kia Cantelmo  
Number of Openings: 5  
Salary: \$10- \$18 per year  
Length of Work Year: 180  
Employment Type: Full Time

ADD TO WISHLIST  
VIEW JOB WISHLIST  
APPLY

View Job Description

Links Related To This Job

CalSTRS Links

**CALSTRS**  
Learn about  
your benefit  
of a lifetime

**CALSTRS**  
Learn about your  
benefit of a lifetime

**CALSTRS**  
Learn about  
your benefit  
of a lifetime

# Onboarding & Retention Toolkit

HOME

## Onboarding & Retention Toolkit

Use these lesson plans to provide the CalSTRS onboarding and retention information to new educators.

### Module 1: Welcome to CalSTRS

- [Welcome to CalSTRS Lesson Plan](#)
- [The Benefit of a Lifetime](#) (leaflet)
- [Welcome to CalSTRS](#) (video)

### Module 2: Understanding the Formula

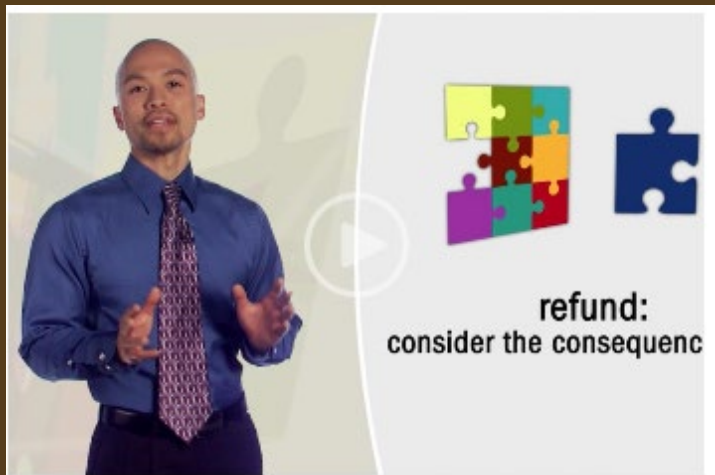
- [Understanding the Formula Lesson Plan](#)
- [Understanding the Formula 2% at 62](#) (video)
- [Understanding the Formula 2% at 60](#) (video)
- [Understanding the Formula](#) (fact sheet)

### Module 3: The Gap

- [The Gap Lesson Plan](#)
- [The Gap](#) (video)
- [CalSTRS Member Handbook](#) (age factor tables)
- [403bCompare](#) (flyer)



# Onboarding & Retention Toolkit



## Resources for You

- Welcome to CalSTRS
- Understanding the Formula
- The Gap
- Survivor Benefits
- Purchasing Service Credit
- Refund: Consider the Consequences
- MyCalSTRS

# Member Events

## CalSTRS is your retirement partner

Join us for our Near Retirement Event  
February 8–19

Understanding your CalSTRS benefits is important as you approach retirement. Register today for one or more of these webinars that will help you decide if it's a good time for you to retire, the decisions you'll need to make, what to expect in retirement, and how to protect your income once you're retired.

### Retire Now or Later

If you're comfortable with technology and want to better understand your retirement options and calculate your own retirement estimates, this Retire Now or Later online workshop is perfect for you.

With the guidance of a CalSTRS benefits specialist, you'll learn how to:

- Access CalSTRS online resources.
- Log into your *myCalSTRS* account and access your *Retirement Progress Report*.
- Use the CalSTRS *Retirement Benefits Calculator* to generate multiple retirement estimates.
- Determine if you can retire now or later.

### Retire Now or Later

Register today!

Monday, February 8, 10:30 a.m. to 12:00 p.m.

Friday, February 12, 1:00 p.m. to 2:30 p.m.

Tuesday, February 16, 3:00 p.m. to 4:30 p.m.

Friday, February 19, 10:30 a.m. to 12:00 p.m.

## 2021

- Part-Time Educator
  - January, April, June
- New Educator
  - January, December
- Late Career Educator
  - February
- Spring into Retirement
  - March
- Mid-Career Educator
  - April, May
- Financial Awareness
  - July
- National Retirement Security Month
  - October
- Retired Educator Event
  - November



# 2021 Pension2 – Targeted Email Campaigns

- Beneficiary
- Enrollment Career Stage
- Increasing Contributions
- New District
- Newly Enrolled
- Compare Services
- Employee to Employer
- Fall Campaign



## Fall is a great time to start

During the past year, many of us took time to reevaluate what's important, try new things and make changes in our lives. If one of your goals is to save more money, CalSTRS Pension2® is a great way to continue investing in yourself.

As a CalSTRS member, your income in retirement is a shared responsibility between CalSTRS and you. Your CalSTRS defined benefit pension will replace some of your salary, but the rest of your retirement income may depend on the additional savings you build.

Pension2's convenient and voluntary 403(b) and 457(b) supplemental savings plans.

- Complement your CalSTRS pension.
- Feature low fees and expenses, so more of your money works for you.
- Offer tax-advantaged contributions and a variety of investment options.



### Try something new

To secure the future you deserve, enroll now or learn more at [Pension2.com](https://pension2.com).

## Protect your loved ones

### Designate a beneficiary today

Passing along the savings in your Pension2® account to those who matter most to you is important. To add or make changes to your designated beneficiary, [log in](#) to your account today.



Click Log in to your Pension2 account.



Click Add/Edit Beneficiary Information from the Personal Information menu.



If beneficiaries are already listed, no action is needed unless you want to make changes.

### Log in today!

If you name a loved one with special needs as your beneficiary, there could be unintended consequences regarding their eligibility for government benefits. Learn more [here](#). Have a question? Call us at 888-394-2060.

Prefer to fill out a beneficiary form? No problem! [Download the beneficiary form](#) and follow the instructions to submit.



Toll free 888-394-2060 | [Pension2.com](https://pension2.com) | [Voya Retire mobile app](#)



## CalSTRS Pension2 is offering objective statement comparison

Pull back the curtain on the fees you may be paying with your current provider.

See how your 403(b), 457(b), 401(k) and IRA accounts compare with CalSTRS' low-cost Pension2 investment options.

### Your statement comparison will cover:

- ▶ An overview of the CalSTRS Pension2 program.
- ▶ A review of your current supplemental savings plans



## Thank you for being a CalSTRS Pension2® 457(b) plan participant

As of July 1, 2021, the Riverside Community College District will only be offering a SchoolsFirst 457(b) plan, which means you'll no longer be able to make contributions to your CalSTRS Pension2 457(b) account.

You can open a CalSTRS Pension2 403(b) account to continue building more retirement income or keep your Pension2 457(b) account open so the funds will continue to accrue interest.





## Pension2 Stats

- At-a-glance:
  - 1,596 plans
  - 26,529 accounts
  - \$1.9 billion AUM as of 12/31/2021



virtual outreach my next steps  
marketing campaigns impersonators  
topical based webinars survivor benefits  
hybrid benefits specialists events  
email encryption virtual job fairs  
immersion programs missed appointment process  
zoom group benefits planning sessions  
in person group benefits planning sessions  
403(b) 26,529 participants mid career the gap statement comparisons  
in person individual benefits planning sessions tpa education  
statewide coverage model service retirement estimate tool  
investment advisory committee  
IRA zoom individual benefits planning sessions part-time educators defined contribution support CSUS  
EdJoin paperless prepping voya 457(b)  
financial awareness member education retirees \$1.9 billion AUM new educator dba rollovers  
counter services  
pension2NAGDCA leadership awards  
disability retirement telephone benefits planning sessions  
service retirement member service centers  
nearing retirement stakeholder engagement  
estimate only zoom webinars