

## Diocese of Oakland - 403(b) Plan

The Diocese of Oakland offers a 403(b) Retirement Investment Plan managed by THE STANDARD (800-858-5420). This is a pre-tax 403(b) retirement investment plan, fully employee-funded through payroll deductions. There is no employer contribution/match.

**Who Can Participate:** All employees of the Diocese of Oakland can participate in the 403(b) Plan. Employees may enroll or opt out at any time.

**Enrollment:** Employees must obtain the booklet “Get Real with your Retirement” from your location Site Administrator or bookkeeper. This booklet explains the investment options and contains the necessary forms to begin investing. Enrollment requires the forms in this booklet. Online enrollment is not available.

**Managing Your Account:** After establishing your account at The Standard, you may manage your account online or via phone.

**Address Change:** If you change your address, obtain and complete a Change of Name/Address form – your location site administrator or bookkeeper has this form. The Bookkeeper provides address change details to The Standard.