

(Management includes Executive, Administrative, Middle Management, Professional and Supervisory and Confidential employees. Police and Fire Safety Management fall under the provisions of the "Management" Plan).

Program Elements	Mandatory Group: January 1, 2008 All Management Employees
	Plan Numbers: ICMA - 800219
Participation	Mandatory
Employer Contribution	1% of gross biweekly compensation.
Mandatory Salary Contribution	1% of gross biweekly compensation.
Vesting	Employee is vested upon enrollment in the plan.
Definition of Retirement	Approved retirement from the City of Anaheim and CalPERS.
Access to City Sponsored Medical Plans	Yes. Requires a minimum of 5 years continuous full-time Anaheim service on the date of retirement.
Eligible Dependents	Any individual who is a dependent of a Participant within the meaning of Code Sections 105(b) and 152.
Eligibility for Benefits	Separation from the City, or at Retirement from the City of Anaheim.
Eligible Benefits	Premiums, including, but not limited to, Medical insurance premiums, Medicare Part B insurance premiums, Medicare Part D insurance premiums, Medicare Supplemental insurance premiums, Prescription Drug insurance premiums, COBRA insurance premiums, Dental insurance premiums, Vision insurance premiums, and Qualified Long-Term Care insurance premiums, permitted under Section 213(d) of the Code, as amended.
Account Fees	Account maintenance fees have been waived by the City for current employees and City of Anaheim retirees. Any additional fees are the responsibility of the employee. Please refer to Provider packet for information on additional fees.
Death Benefits	Account Transfer – Surviving Covered Spouse and Covered Dependents (as defined by IRC).

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Participant's Name: _____ Date: _____
(Print Name)

Participant's Signature: _____

ANAHEIM MUNICIPAL EMPLOYEES ASSOCIATION – GENERAL AND CLERICAL EMPLOYEES

	<i>Voluntary Group</i>	<i>Mandatory Group</i>
Program Elements	AMEA General & Clerical Employees Hired prior to January 1, 1996	AMEA General & Clerical Employees Hired on or after January 1, 1996
	Plan Number: ICMA - 800153	Plan Number: ICMA - 800152
Participation	Voluntary	Mandatory
Employer Contribution	Effective December 26, 2008 and annually thereafter, the City shall make a contribution to each employee's account. The contribution shall be an amount equivalent to one percent (1%) of the average annual base compensation of all full time "PERS Miscellaneous" employees in classifications not represented by the IBEW. The first pay period ending in December will be used for such calculation.	One-time lump sum employer contribution of \$3,000 the first pay cycle following hire. Effective December 26, 2008 and annually thereafter, the City shall make a contribution to each employee's account. The contribution shall be an amount equivalent to one percent (1%) of the average annual base compensation of all full time "PERS Miscellaneous" employees in classifications not represented by the IBEW. The first pay period ending in December will be used for such calculation.
Mandatory Salary Contribution	1% of gross biweekly pay <u>IF</u> employee elects to participate.	3% of gross bi-weekly pay
Elective Contribution	Each November you may designate leave hours as an elective contribution. Once elected, leave contribution is mandatory for the following year's earned leave hours as designated. <ul style="list-style-type: none"> • Sick Leave – up to 2 hours/pay period • Vacation – hours earned over 3/pay period 	Each November you may designate leave hours as an elective contribution. Once elected, leave contribution is mandatory for the following year's earned leave hours as designated. <ul style="list-style-type: none"> • Sick Leave – up to 2 hours/pay period • Vacation – hours earned over 3/pay period
Vesting	Not applicable. There is no city contribution.	5 year cliff vesting for City contribution. Immediate vesting for employee contributions.
Definition of Retirement	Approved retirement from the City of Anaheim and CalPERS.	Approved retirement from the City of Anaheim and CalPERS.
Access to City Sponsored Medical Plans	Yes. Requires a minimum of 10 years continuous full-time Anaheim service on the date of retirement.	Yes. Requires a minimum of 10 years continuous full-time Anaheim service on the date of retirement.
Eligible Dependents	Any individual who is a dependent of a Participant within the meaning of Code Sections 105(b) and 152.	Any individual who is a dependent of a Participant within the meaning of Code Section 105(b) and 152.
Eligibility for Benefits	Separation from the City, or at Retirement from the City of Anaheim.	Separation from the City, or at Retirement from the City of Anaheim.
Eligible Benefits	As generally allowed under IRC Section 213 with exceptions as provided in the City's RHS Plan.	As generally allowed under IRC Section 213 with exceptions as provided in the City's RHS Plan.
Account Fees	Account maintenance fees have been waived by the City for current employees and City of Anaheim retirees. Any additional fees are the responsibility of the employee. Please refer to Provider packet for information on additional fees.	Account maintenance fees have been waived by the City for current employees and City of Anaheim retirees. Any additional fees are the responsibility of the employee. Please refer to Provider packet for information on additional fees.
Death Benefits	Account Transfer – Surviving Covered Spouse and Covered Dependents (as defined by IRC).	Account Transfer – Surviving Covered Spouse and Covered Dependents (as defined by IRC).

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ANAHEIM POLICE ASSOCIATION: (Chief of Police, Deputy Chief of Police, Police Captain and Police Lieutenant are covered under the "Management" Plan)

	<i>Voluntary Group</i>	<i>Mandatory Group</i>
Program Elements	Anaheim Police Association Employees hired prior to July 6, 2001	Anaheim Police Association Employees hired on or after July 6, 2001
	Plan Numbers: ICMA - 800257	Plan Numbers: ICMA - 800256
Participation	Voluntary	Mandatory
Employer Contribution	No employer contribution. Covered under Post Retirement Medical Plan as provided in Article 60 of MOU	One-time lump sum employer contribution of \$3,000 the first pay cycle following hire.
Mandatory Salary Contribution	½% of gross biweekly pay <u>IF</u> employee elects to participate.	3.0% of gross bi-weekly pay.
Elective Contribution	Each November you may designate paid leave hours as an elective contribution. Once elected, leave contribution is mandatory for the following year's earned leave hours as designated. <ul style="list-style-type: none"> May designate in ½ hour increments, Paid Leave-Hours earned over 6/pay period 	Each November you may designate paid leave hours as an elective contribution. Once elected, leave contribution is mandatory for the following year's earned leave hours as designated. <ul style="list-style-type: none"> May designate in ½ hour increments, Paid Leave-Hours earned over 6/pay period
Vesting	Not applicable. There is no city contribution.	5 year cliff vesting for City contribution. Immediate vesting for employee contributions
Definition of Retirement	Approved retirement from the City of Anaheim and CalPERS.	Approved retirement from the City of Anaheim and CalPERS.
Access to City Sponsored Medical Plans	Yes. Requires a minimum of 10 years continuous full-time Anaheim service on the date of retirement.	Yes. Requires a minimum of 10 years continuous full-time Anaheim service on the date of retirement.
Eligible Dependents	Any individual who is a dependent of a Participant within the meaning of Code Sections 105(b) and 152.	Any individual who is a dependent of a Participant within the meaning of Code Sections 105(b) and 152.
Eligibility for Benefits	Separation from the City, or at Retirement from the City of Anaheim.	Separation from the City, or at Retirement from the City of Anaheim.
Eligible Benefits	As generally allowed under IRC Section 213 with exceptions as provided in the City's RHS Plan.	As generally allowed under IRC Section 213 with exceptions as provided in the City's RHS Plan.
Account Fees	Account maintenance fees have been waived by the City for current employees and City of Anaheim retirees. Any additional fees are the responsibility of the employee. Please refer to Provider packet for information on additional fees.	Account maintenance fees have been waived by the City for current employees and City of Anaheim retirees. Any additional fees are the responsibility of the employee. Please refer to Provider packet for information on additional fees.
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ANAHEIM FIREFIGHTERS ASSOCIATION: (Fire Chief, Fire Division Chief, Fire Battalion Chief and Deputy Fire Marshal are covered under the "Management" Plan)

	<i>Voluntary Group</i>	<i>Mandatory Group</i>
Program Elements	Anaheim Firefighters Association Employees hired prior to November 9, 2001	Anaheim Firefighters Association Employees hired on or after November 9, 2001
		Plan Numbers: ICMA 800217
Participation	No Plan adopted	Mandatory
Employer Contribution	N/A	One-time lump sum employer contribution of \$3,000 the first pay cycle following hire.
Mandatory Salary Contribution	N/A	Equivalent to 3% of the top step of Firefighter IV base earnings.
Elective Contribution	N/A	Each November you may designate leave hours as an elective contribution. Once elected, leave contribution is mandatory for the following year's earned leave hours as designated. <ul style="list-style-type: none"> • Sick Leave-up to 2 hrs/pay period (40 hour employees) • Vacation-Hours over 3/pay period (40 hour employees) • Paid Leave-Hours over 6/pay period (56 hour employees)
Vesting	N/A	5 year cliff vesting for City contribution. Immediate vesting for employee contributions
Definition of Retirement	N/A	Approved retirement from the City of Anaheim and CalPERS
Access to City Sponsored Medical Plans	N/A	Yes. Requires a minimum of 10 years continuous full-time Anaheim service on the date of retirement.
Eligible Dependents	N/A	Any individual who is a dependent of a Participant within the meaning of Code Sections 105(b) and 152.
Eligibility for Benefits	N/A	Separation from the City, or at Retirement from the City of Anaheim.
Eligible Benefits	N/A	As generally allowed under IRC Section 213 with exceptions as provided in the City's RHS Plan.
Account Fees	N/A	Account maintenance fees have been waived by the City for current employees and City of Anaheim retirees. Any additional fees are the responsibility of the employee. Please refer to Provider packet for information on additional fees.
Death Benefits	N/A	Account Transfer – Surviving Covered Spouse and Covered Dependents (as defined by IRC).

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INTERNATIONAL BROTHERHOOD OF ELECTRICAL WORKERS – LOCAL 47

Program Elements	IBEW Employees
	Plan Number: ICMA - 801405
Participation	Voluntary
Employer Contribution	None
Mandatory Salary Contribution	2% of gross bi-weekly pay (if employee elects to participate)
Elective Contribution	Each November you may designate leave hours as an elective contribution. Once elected leave contribution is mandatory for the following year's earned leave hours as designated. <ul style="list-style-type: none"> • Sick Leave – up to 2 hours/pay period • Vacation – hours earned over 3/pay period
Vesting	Not applicable. There is no City contribution
Definition of Retirement	Approved retirement from the City of Anaheim and CalPERS.
Access to City Sponsored Medical Plans	Yes. Requires a minimum of 10 years continuous full-time Anaheim service on the date of retirement. Yes. Requires a minimum of 10 years continuous full-time Anaheim service on the date of retirement.
Eligible Dependents	Any individual who is a dependent of a Participant within the meaning of Code Sections 105(b) and 152.
Eligibility for Benefits	Separation from the City, or at Retirement from the City of Anaheim.
Eligible Benefits	As generally allowed under IRC Section 213 with exceptions as provided in the City's RHS Plan.
Account Fees	Account maintenance fees have been waived by the City for current employees and City of Anaheim retirees. Any additional fees are the responsibility of the employee. Please refer to Provider packet for information on additional fees.
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