

ANAHEIM MUNICIPAL EMPLOYEES ASSOCIATION – GENERAL AND CLERICAL EMPLOYEES

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	Mandatory	Mandatory
Employer Contribution	N/A	One-time lump sum employer contribution of \$3,000 the first pay cycle following hire and; 1% of gross bi-weekly pay.
Mandatory Salary Contribution	1% of gross bi-weekly pay.	3% of gross bi-weekly pay.
Vesting	Employee is vested upon enrollment in the plan.	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).

This document is not all inclusive and is only a summary of the general plan. In the case of any conflict between the terms of the Plan document and of this or any other summary of the Plan, or any statement concerning the Plan made by any person, the terms of the Plan document will be the final authority.

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I understand that the City of Anaheim's Retirement Health Savings Plan has not been approved by the IRS, but is based upon opinion of outside counsel.

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

Participant's Signature: _____

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 <u>prior to</u> July 6, 2001	Anaheim Police Association Employees hired <u>on or after</u> July 6, 2001
	Plan Numbers: ICMA - 800257 CLOSED TO CONTRIBUTIONS JANUARY 1, 2010	Plan Numbers: ICMA - 800256
Participation	N/A	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	3.0% of gross bi-weekly pay.
Vesting	N/A	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.
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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(Print Name)

Participant's Signature: _____

INTERNATIONAL BROTHERHOOD OF ELECTRICAL WORKERS – LOCAL 47

Program Elements	IBEW Employees
	Plan Number: ICMA - 801405 - CLOSED TO CONTRIBUTIONS JANUARY 1, 2010
Participation	N/A
Employer Contribution	N/A
Mandatory Salary Contribution	N/A
Vesting	N/A
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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(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	<i>Mandatory Group: January 1, 2008 All Management Employees</i>
	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.
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