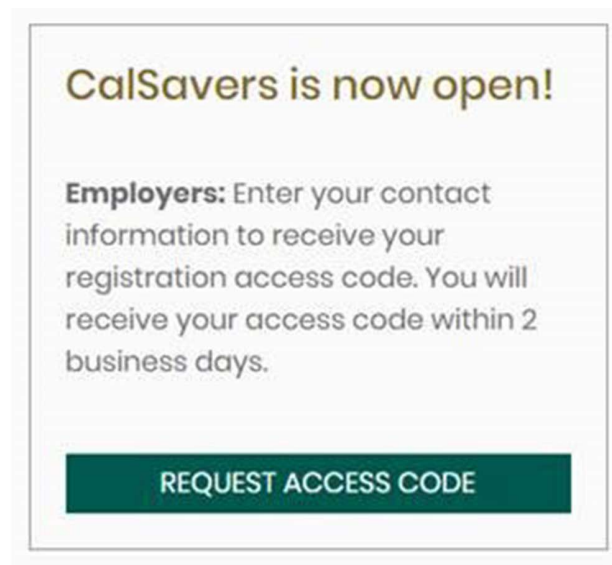


# How to Certify Your Exemption with CalSavers

## STEP 1

Visit <https://employer.calsavers.com/> to request your access code:



# How to Certify Your Exemption with CalSavers

## STEP 2

Fill out the form below to receive your access code. This could take up to 2 business days.



### CalSavers is now open for employer registration!

Why wait! Request your registration access code and begin facilitating CalSavers today.

**Please note:** An access code is one of three pieces of information you will need to register for CalSavers. (Read about the other information requirements at [employer.calsavers.com](http://employer.calsavers.com).) By submitting this form today, you are requesting an access code to begin your CalSavers registration. All eligible employers are encouraged to join at any time prior to their [registration deadline](#). Within 2 business days, you will receive an e-mail with your access code and instructions to begin your registration in the [CalSavers Employer Portal](#).

**After you register, you will be required to begin facilitating the program, including uploading your employee roster and facilitating payroll contributions. You will have 30 days from the date you register for the program to upload your employee roster.**

#### Enter Your Company Information:

Legal business name  
DBA name (If applicable. Type NA if not.)  
Contact name  
Contact email  
Contact phone  
Physical Address  
Mailing Address (If different. Type NA if not.)  
Number of employees (You must have 5 or more eligible employees to participate.)

#### How did you hear about CalSavers?

#### Enter Your CA Employer Payroll Tax Account Number

Enter Number

#### Enter Your Federal Employer Identification or Tax Identification Number (EIN/TIN)

Enter Number

Save

Submit



**Your access code request has been received.**

Thank you for requesting your access code to register for CalSavers. Within 2 business days, you will receive your **Welcome Notification** with your access code and instructions to begin your portal registration.

When you receive your access code, return to the [Employer Portal](#) to register your company or indicate your exempt status.

Visit [employer.calsavers.com](http://employer.calsavers.com) to learn more about facilitating CalSavers.

#### Here is what else you will need to register your company with CalSavers:

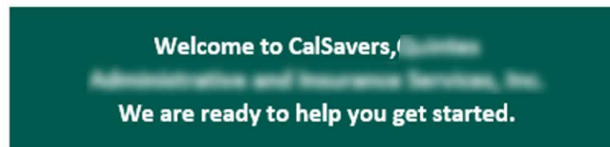
- CA Employer Payroll Tax Account Number
- Federal Employer Identification or Tax Identification Number (EIN/TIN)

**Soon after submitting, you should receive a confirmation email >>>**

# How to Certify Your Exemption with CalSavers

## STEP 3

Within 2 business days, you should receive your access code and a link to [employer.calsavers.com](https://employer.calsavers.com).



The State of California is rolling out CalSavers, its new retirement savings program for workers. CalSavers ensures that nearly all Californians have access to a workplace retirement savings program by providing a simple, portable, low-cost way for workers to invest in their futures.

Your company is required to register for CalSavers if all of the following apply:

- You have 5 or more workers in California.
- You have at least one eligible employee (age 18+).
- You do not already offer a qualifying employer-sponsored retirement plan.

You play a limited but important role in helping your employees save. That's why we've made facilitating CalSavers as easy as possible. Your role is simple, focusing mostly on adding employee information and sending their contributions as payroll deductions.

[I'd Like To Learn More About The Program And Requirements](#)

### Ready to begin?

Register today to give your employees access to start saving right away. Even though your [state-required deadline](#) is in the future, it's simple to start now. We have a user-friendly website that guides you through each step and a customer-focused Client Service team ready to assist if you have questions.

Here is what you need:

- CA Employer Payroll Tax Account Number
- Federal Employer Identification or Tax Identification Number (EIN/TIN)
- CalSavers access code: [\[redacted\]](#)

[I'd Like To Register Now](#)

### Are you exempt?

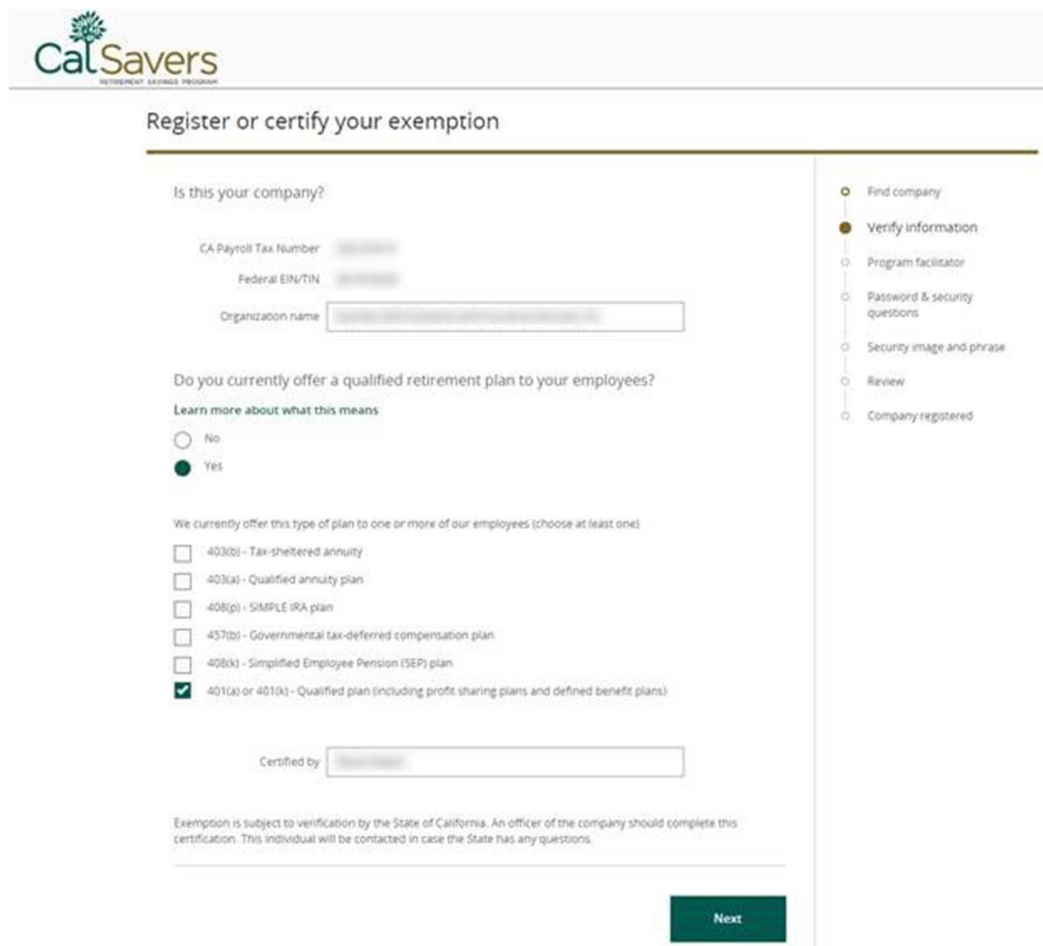
California regulations require that California employers register for CalSavers by [specific deadlines](#) if they do not already offer an employer-sponsored retirement plan.

If you believe that your company is exempt from this requirement, please visit [employer.calsavers.com](https://employer.calsavers.com) to let us know.

# How to Certify Your Exemption with CalSavers

## STEP 4

You will be directed to the following page where you can register or certify your exemption.



The screenshot shows the CalSavers website interface for registering or certifying an exemption. The header features the CalSavers logo and the text 'Register or certify your exemption'. The main form area is titled 'Is this your company?' and includes fields for 'CA Payroll Tax Number', 'Federal EIN/TIN', and 'Organization name'. Below these fields is a question: 'Do you currently offer a qualified retirement plan to your employees?' with radio button options for 'No' and 'Yes' (selected). A link 'Learn more about what this means' is provided. Underneath, a section titled 'We currently offer this type of plan to one or more of our employees (choose at least one)' lists several plan types with checkboxes: 403(b) - Tax-sheltered annuity, 403(a) - Qualified annuity plan, 408(p) - SIMPLE IRA plan, 457(b) - Governmental tax-deferred compensation plan, 408(k) - Simplified Employee Pension (SEP) plan, and 401(a) or 401(k) - Qualified plan (including profit sharing plans and defined benefit plans) (checked). A 'Certified by' field is at the bottom. A sidebar on the right shows a progress bar with steps: Find company, Verify information (current), Program facilitator, Password & security questions, Security image and phrase, Review, and Company registered. A 'Next' button is at the bottom right.

CalSavers  
RETIREMENT SAVINGS PROGRAM

### Register or certify your exemption

Is this your company?

CA Payroll Tax Number

Federal EIN/TIN

Organization name

Do you currently offer a qualified retirement plan to your employees?

[Learn more about what this means](#)

☐ No

☒ Yes

We currently offer this type of plan to one or more of our employees (choose at least one)

☐ 403(b) - Tax-sheltered annuity

☐ 403(a) - Qualified annuity plan

☐ 408(p) - SIMPLE IRA plan

☐ 457(b) - Governmental tax-deferred compensation plan

☐ 408(k) - Simplified Employee Pension (SEP) plan

☒ 401(a) or 401(k) - Qualified plan (including profit sharing plans and defined benefit plans)

Certified by

Exemption is subject to verification by the State of California. An officer of the company should complete this certification. This individual will be contacted in case the State has any questions.

[Next](#)

- Find company
- Verify information
- Program facilitator
- Password & security questions
- Security image and phrase
- Review
- Company registered

**After clicking Next, you will receive your certificate of exemption.  
That's it. You are now in compliance!**