



CalSavers Retirement Savings Program

Participation & Funding Snapshot as of 1/31/2020

Employer Registration Status Changes

Employer Status	1/31/2020	10/31/2019	Change	% Change
Registered	813	362	451	124.6%
Uploaded Roster	462	203	259	127.6%
Started Payroll Deductions	191	102	89	87.3%
Facilitated Deductions in last 90 days	N/A	N/A	N/A	N/A
Exempt	994	407	587	144.2%

Participant Savings and Enrollment Changes

Participant Account Status	1/31/2020	10/31/2019	Change	% Change
Funded Accounts	4,479	2,769	1,710	61.8%
Payroll Contributing Accounts	N/A	N/A	N/A	N/A
Multiple Employer Accounts*	N/A	N/A	N/A	N/A
Self-Enrolled Funded Accounts	N/A	N/A	N/A	N/A
Effective Opt-Out Rate	28.67%	31.74%	-3.07%	-9.7%

Status of Eligible Employers by Wave

Wave (Deadline)	Employers Registered	Employers Exempted	Total Employers Responded	Total Estimated Eligible Employers	Employer Response Rate
Wave 1 (9/30/2020)	N/A	N/A	N/A	N/A	N/A
Wave 2 (6/30/2021)	N/A	N/A	N/A	N/A	N/A
Wave 3 (6/30/2022)	N/A	N/A	N/A	N/A	N/A
Total	N/A	N/A	N/A	N/A	N/A

* This data point reflects the number of funded account holders associated with more than one registered employer
** Withdrawal Rate is calculated as Accounts with a full withdrawal as a percent of Payroll Contributing Accounts

Funding Amounts and Withdrawals

Funding Amounts	1/31/2020	10/31/2019	Change	% Change
Total Assets	\$1,728,445	\$917,343	\$811,102	88.4%
Average Funded Account Balance	\$386	\$331	\$55	16.6%
Total Contributions Amount	\$1,909,892	\$989,618	\$920,274	93.0%
Average Monthly Contribution Amount	\$114	\$104	\$10	9.6%
Median Monthly Contribution Amount	\$75	\$68	\$7	10.3%
Average Contribution Rate	5.24%	4.98%	0.26%	5.2%
Amount of Withdrawals	\$195,061	\$78,366	\$116,695	148.9%
Accounts with a Full Withdrawal	N/A	N/A	N/A	N/A
Accounts with a Partial Withdrawal	N/A	N/A	N/A	N/A
Withdrawal Rate**	N/A	N/A	N/A	N/A

