



CA Voluntary Plan Feasibility Request:

***Two feasibility studies will be provided at no cost. One set up as a CA State Plan match, the other a plan design of your choice.**

1. Client Legal Name: _____
2. CA EIN# (**NOT** FEIN): _____
3. Include a census containing **ONLY** CA employees (**one census per EIN as each EIN will require its own VDI Plan**).
 - a. **The census should contain Date of Birth/Age, Gender and Annual Taxable Income for CA employees ONLY.**
4. Plan Design
 - a. Included will be one state of CA match plan; plus, one custom plan design. For the custom plan design please provide the following:
 - i. ___% to Weekly Benefit Maximum of \$ _____ (i.e. 70% to Max Weekly of \$2000), Employee contribution rate of _____% (state rate for 2025 will be 1.2%)
 - ii. If requesting a salary cap for contributions, please indicate what that cap is \$ _____ (Note that you cannot cap the EDD Assessments. Assessments are calculated using all taxable wages).

Note: All CA VDI plans MUST contain at least one benefit greater than that of CA State Disability Insurance.

Turnaround time is approximately 7 to 10 business days. Requests should be sent to Jeff.Higgins@tristargroup.net and CAVDI@tristargroup.net

Thanks

More information about California Voluntary Plans can be found here:

https://edd.ca.gov/siteassets/files/pdf_pub_ctr/de2040.pdf

https://edd.ca.gov/en/Disability/VP_Forms_and_Publications