

RETIREMENT@work®

Quick Start Guide

University of Houston Systems retirement plan.
In one location.

UNIVERSITY of
HOUSTON
SYSTEM

Retirement@Work®



WELCOME TO RETIREMENT@WORK®, WHERE YOU CAN:

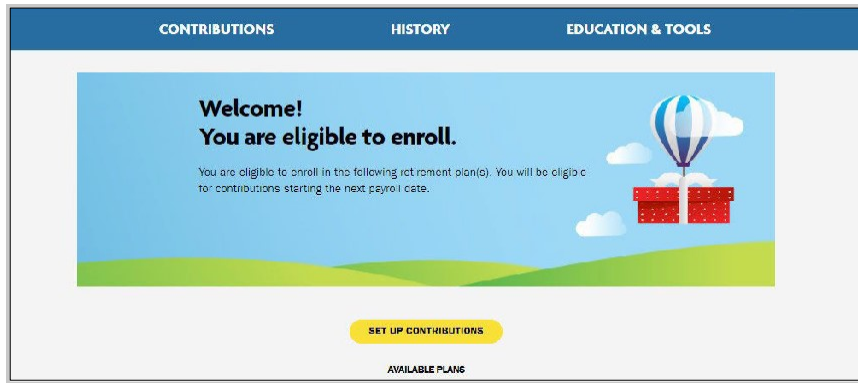
- Enroll in your retirement plan(s)
- Change your voluntary contribution amount at any time
- Choose your preferred retirement plan provider(s)
- View of retirement plan balances across plans and investment providers
- Access tools and resources for planning

1. ACCESS RETIREMENT@WORK

Click the link provided by your employer to gain access to Retirement@Work. If prompted, log in or register for access.

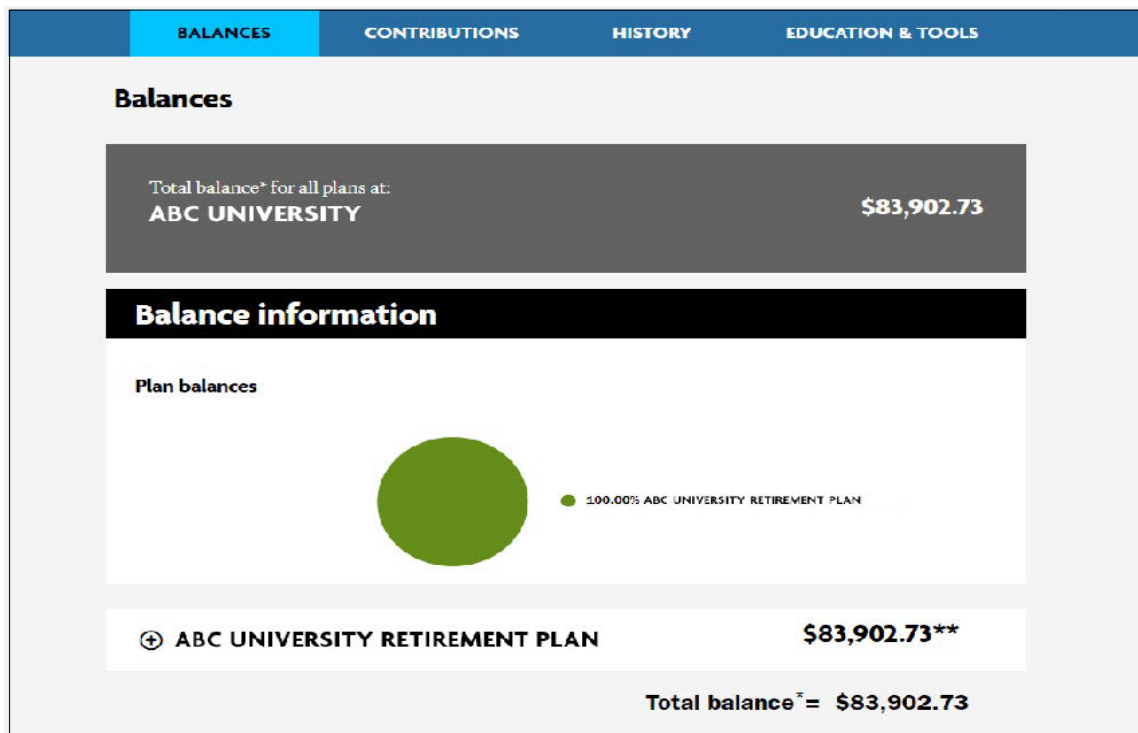
2. SET UP AND MANAGE YOUR CONTRIBUTIONS

A. **FIRST-TIME USERS:** Click *Set Up Contributions*.




Click the + next to each plan to read more information and review available investment providers.


B. **RETURNING USERS:** You will be taken to the *Balances* tab, where you can view your total balance in the Plan, regardless of provider. To change your contributions, go to the *Contributions* tab and click *Manage Contributions*.



Contributions

 If you have not opened an account with an investment provider, please select the following provider's link to enroll: [TIAA](#)

Welcome!

 View your payroll calendar: [Payroll Schedules](#)

Enter any contributions you made this year through a different employer to ensure you don't exceed the maximum amount year.

Summary

Stop voluntary contributions

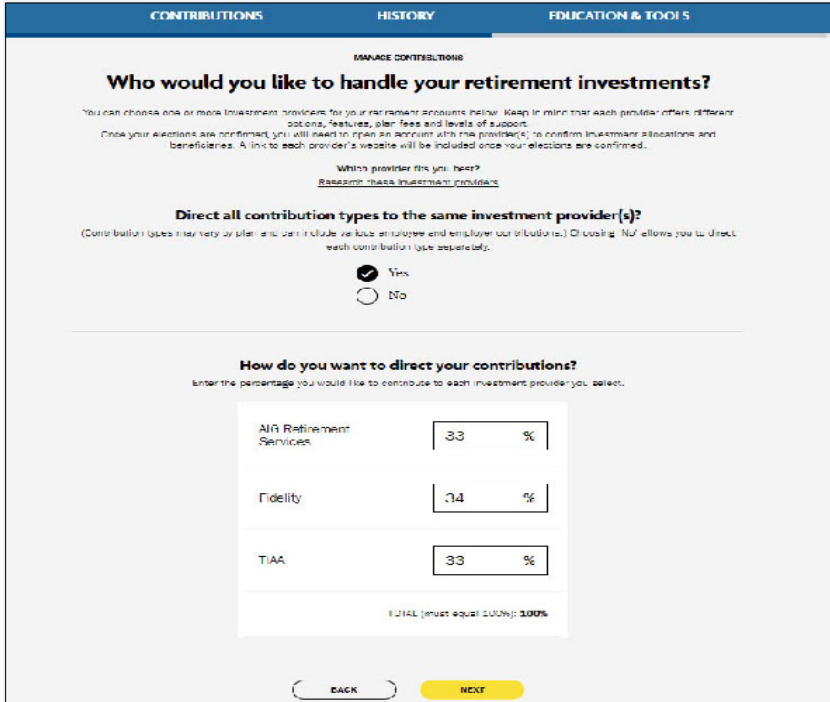
[MANAGE CONT](#)

- i. On the next page, enter the amount you want to contribute to the voluntary plan(s) per pay period and when you want contributions to start.
- ii. Click the indicated button to split your contributions between pretax and Roth.

1. Based on the percentage you enter, you'll see an estimate of your dollar contribution per pay period.

3. SELECT INVESTMENT PROVIDERS

- Decide if you want to direct all of your contributions to the same investment provider(s) and click **Yes** or **No**.
 - If you choose **Yes**, all plans in which you contribute and all contribution types, which, based on your plan(s), may include employee contributions, pretax, and Roth, will be directed to the same investment provider(s) in the same percentages.
 - If you choose **No**, you will then make your choices by individual plan and contribution type. Enter the percentage you wish to allocate to each provider. Ensure your total equals 100 percent.



MANAGE CONTRIBUTIONS

Who would you like to handle your retirement investments?

You can choose one or more investment providers for your retirement accounts below. Keep in mind that each provider offers different options, features, plan fees and levels of support. Once your elections are confirmed, you will need to open an account with the provider(s) to confirm investment selections and beneficiaries. A link to each provider's website will be included once your elections are confirmed.

Which provider do you prefer?
[Reassign these investment providers](#)

Direct all contribution types to the same investment provider(s)?

(Contribution types may vary by plan and can include various employee and employer contributions.) Clicking "No" allows you to direct each contribution type separately.

Yes
 No

How do you want to direct your contributions?

Enter the percentage you would like to contribute to each investment provider you select.

AIR Retirement Services	33	%
Fidelity	14	%
TIAA	33	%

TOTAL (must equal 100%): 100%

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4. REVIEW OF YOUR CONTRIBUTIONS

- Check to be sure your desired selections are reflected in the summary. If they are not, **click the *Edit* button** to make changes.
- Once your selections are shown, review the “Terms and Conditions,” check the box, then click *Confirm*. The next page will confirm that your elections were submitted.

5. OPEN YOUR INVESTMENT ACCOUNT(S) AND SELECT INVESTMENTS

- Click the name of each provider you selected to open an account with them (if you do not have one already) and choose your investments by plan. You will exit Retirement@Work and be taken to each provider’s website to complete this task. If you select multiple providers, you must return to this page to click each provider’s name to complete the process.

SET UP CONTRIBUTIONS

Your elections were submitted

You have successfully set up how much you will be contributing to the following retirement plan(s). Please continue in order to complete your enrollment.

i **NEXT STEP:** Open Your Investment Accounts
Remember, if you do not have a current account through ABC Organization with the providers below, you will need to open an account.
Click the buttons below to do so.

TIAA PROVIDER 1 PROVIDER 2

If you do not have an existing account through ABC Organization with your selected investment providers and do not open an account, your contribution will be automatically invested in the age appropriate TIAA ANNUITY ACCOUNTS at your selected investment providers.



You may be required to enter a plan number once on your selected provider's site to continue enrollment.

Need help? We’ve got you covered.

Site support

Call Retirement@Work at 844 567-9090 weekdays, 7 a.m. to 9 p.m. (CT).

Advice and education

You can get help deciding how to create the right investment mix with your chosen investment provider(s), over the phone or in person.

- **Corebridge “AIG”:** 713 463-4507
- **Fidelity:** 800 343-0860
- **TIAA:** 800-842-2252
- **Voya:** 888 311-9487