RETIREMENT@work

Quick Start Guide

Everything for the UCF voluntary 403(b) plan. In one location.

Welcome to Retirement@Work®, where you can:

- Enroll in the UCF voluntary 403(b) plan
- Change your voluntary contribution amount at any time
- Choose your preferred retirement plan provider(s)
- View retirement plan balances across plans and investment providers
- Access tools and resources for planning



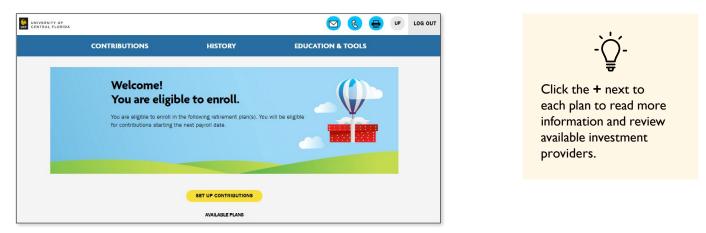


1. Access Retirement@Work

Click the link on the UCF Human Resources website Retirement page (https://hr.ucf.edu/current-employees/ retirement/) to gain access to Retirement@Work. If prompted, log in using your MyUCF NID and password.

2. Set up and manage your contributions

First time users: Click Set Up Contributions.



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*.

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	BALANCES	CONTRIBUTIONS	HISTORY	EDUCATION & TOOLS	
Bala	ances				
U	otal balance* for all JNIVERSITY C	plans at: DF CENTRAL FLORIDA		\$83,902.73	
Ba	alance info	rmation			1
Pla	n balances				
		•	100.00% UNIVERSITY OF	r central florida 403(8)	
Ð	University of	Central Florida 403(b)		\$83,902.73** Balance as of 09/10/2020	
			Total ba	lance [*] = \$83,902.73	

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BALANCES	CONTRIBUTIONS	HISTORY	EDUCATION & TOOLS		
Contributions					
(i) If you have not opened an acc Services. Fidelity	ount with an investment provider, please	e select the following provider's I	link to enroll: TIAA , AIG Retirement		
Welcome to the UCF 403(b) Plan (UCF offers multiple savings plans			ntary 403(b) plan.		
 9-Month Faculty: Contributions summer pay. 	should be based on the # of regular pa	sychecks you will receive each ye	ar. Contributions are deducted from		
Enter prior contributions to ensure	you don't exceed the maximum al	lowable contribution amount	t per year.		

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.

Click the indicated button to split your contributions between pretax and Roth.

- If you enter a percentage, you'll see an estimate of your dollar contribution per pay period.
- If you enter a dollar amount, you'll see an estimate of your percentage 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.

CONTRIB	UTIONS	HISTORY	EDUCATION & TOOLS
		MANAGE CONTRIBUTIONS	
Who woul	d you like to	handle your re	tirement investments?
Once your elections are	options, fe confirmed, you will need	atures, plan fees and levels of to open an account with the p	ow. Keep in mind that each provider offers differen support. rovider(s) to confirm investment allocations and nce your elections are confirmed.
		Which provider fits you best? earch these investment provid	<u>11</u>
Direc	t all contribution	types to the same in	vestment provider(s)?
Contribution types may var		various employee and employ tch contribution type separatel	er contributions.) Choosing 'No' allows you to direc /-
		Ves Yes	
		O No	
Ente		vant to direct your co Id like to contribute to each im int 33	
	Fidelity	34	%
	TIAA	33	%
		TOTAL (must equal :	100%): 100%

Voluntary State University System Optional Retirement Program (SUSORP) contributions count toward the annual 403(b) maximum contribution limit. For information regarding the annual contribution limit, refer to the Voluntary Retirement Plans page of the UCF Benefits Guide: https://hr.ucf.edu/files/UCF-Employee-Benefits-Guide.pdf.

4. Review 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 select your investments by plan. You will exit Retirement@Work and be taken to each provider's website to complete this task. If you selected more than one provider, **you must return to this page** to click each provider's name to complete the process.

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CONTRIBUTIONS	HISTORY	EDUCATION & T	TOOLS			-Ô-
MANAGE CONTRIBUTIONS Confirmation: 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.						You will be required t enter a plan number once on your selecter
NEXT STEP: Open Your Investment Accounts If you have not done so already, visit each im investment strategy. Click the buttons below to do so.	restment provider you selected to open you	ur account, designate beneficiaries, a	ind customize your			provider's site to continue enrollment: AIG: 07697001 (preta
If you choose not to proceed to each provide directed to an age appropriete Target Date Fit	r's webpage to open your account and cust	tomize your investments, your contrib	utions will be			07697101 (Roth Fidelity: 56713 TIAA: Not needed

Need help? We've got you covered.

Site support

Call Retirement@Work at 844-567-9090, weekdays, 8 a.m. to 10 p.m. (ET).

Advice and education

You can get help deciding how to create the right investment mix with your chosen investment provider(s) or from CAPTRUST, an independent investment advisory firm hired by UCF:

- AIG: 800-448-2542 or https://hr.ucf.edu/current-employees/retirement/#retireId
- CAPTRUST: 800-967-9948 or www.captrustadvice.com
- Fidelity: 800-343-0860 or https://nb.fidelity.com/public/nb/ucf/contactus/schedule-a-meeting
- TIAA: 800-842-2252 or TIAA.org/schedulenow

General plan questions

Call the UCF HR Office at 407-823-2771, weekdays 8 a.m. to 5 p.m. (ET) or email benefits@ucf.edu.

Learn more

Visit website: https://hr.ucf.edu/current-employees/retirement/

