

# 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

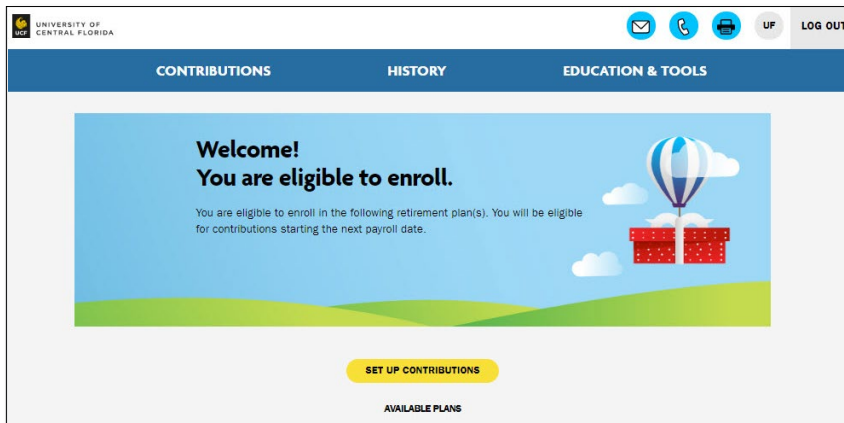


# 1. Access Retirement@Work

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.

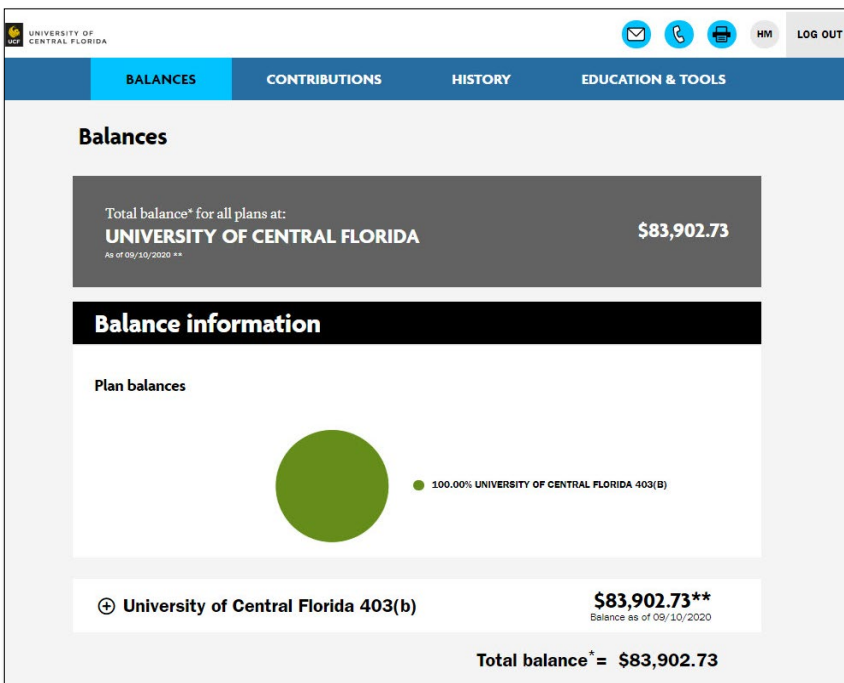
# 2. Set up and manage your contributions

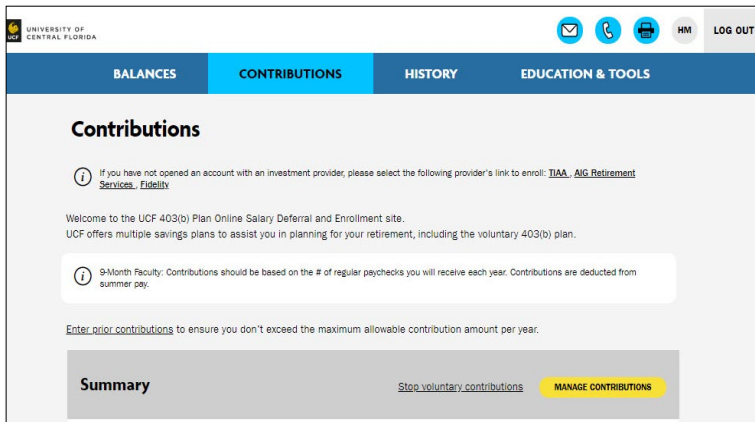
First time users: Click *Set Up Contributions*.



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

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*.





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.

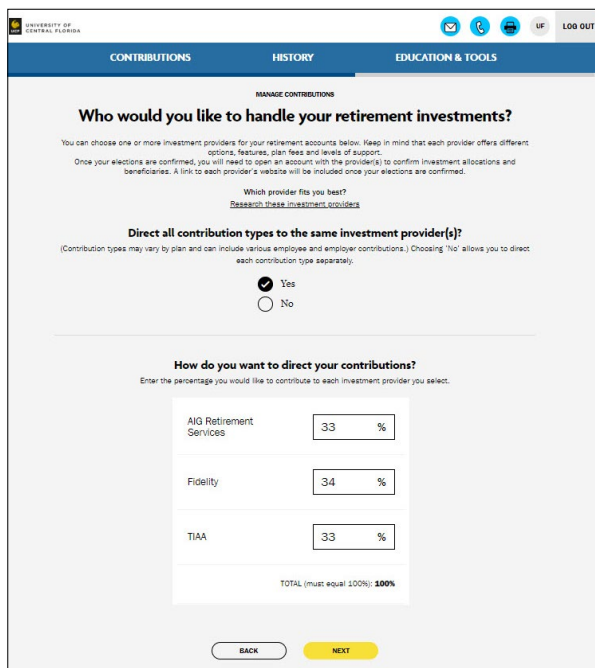
### 3. Select investment providers

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.



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

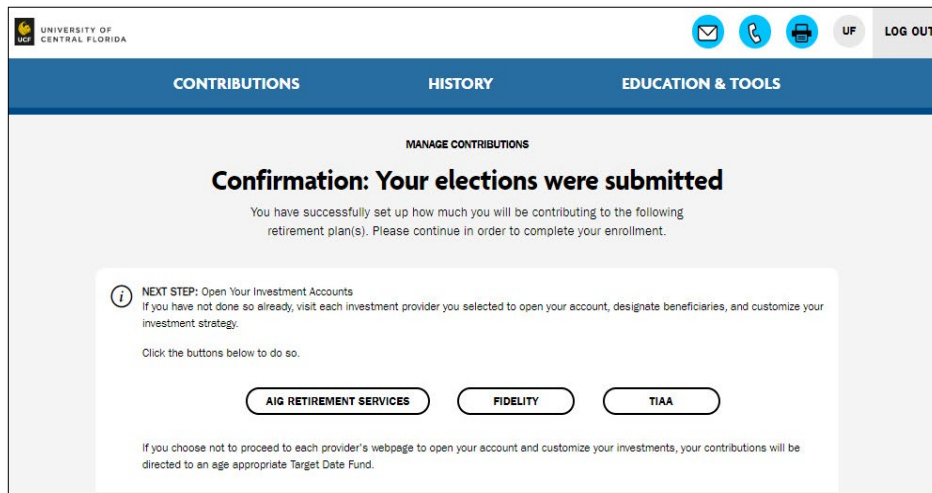
Check to be sure your desired selections are reflected in the summary.

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.



You will be required to enter a plan number once on your selected provider’s site to continue enrollment:

AIG: 07697001 (pretax)  
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](http://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](http://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](mailto:benefits@ucf.edu).

## Learn more

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