

## Supplemental 403(b) Plan Enrollment Guide

To enroll in the University of Illinois Supplemental 403(b) Retirement Plan, you must do two things.

- 1) Select an investment company(s) and open an account.
- 2) Complete a “Salary Reduction and/or Redirection Agreement” (SRA) form, which authorizes the University to withhold your 403(b) contributions from your pay and send them to the investment company on your behalf.

### Step 1: Select Investment Company(s) and Open Account(s)

Learn about the two investment companies and the different funds they offer. Review the company websites and read their fund prospectuses online. Call the investment company(s) directly to obtain paper copies of these materials.

To open a 403(b) account, please follow the instructions for the appropriate investment company below.

Enroll with Fidelity Investments:

- Visit <http://www.netbenefits.com/uofi403b> and select “Enroll Today”.
- Complete all required fields. The Plan ID number (50764) will be listed. If not, enter 50764 in the New Plan ID field.
- Choose your investments - links will be available for further information on the fund choices.
- Upon completion of this process, **record the Fidelity confirmation number, which will be required to proceed with Step 2 of the enrollment process.**  
Record your confirmation number here: \_\_\_\_\_
- Choose your beneficiary(s) by downloading and completing the appropriate form.

Enroll with TIAA:

- Visit <http://www.tiaa.org/uofi403b/> and select “Ready to Enroll”.
- Under Enroll in your 403(b) Retirement Plan, click on “Begin Enrollment”.
- If you are a returning user, enter your User ID under “Already registered with TIAA” and click “login”;  
If you are a first-time user and need to create your User ID and password, click “Register with TIAA”.  
User ID \_\_\_\_\_ Password \_\_\_\_\_
- Follow the on-screen directions to complete your enrollment application, clicking “Next” in the lower-right corner to advance each screen.
- Upon completion of this process, **record the TIAA enrollment confirmation number, which will be required to proceed with Step 2 of the enrollment process.**  
Record your confirmation number here: \_\_\_\_\_

If you need assistance with the online enrollment process, please contact the investment company directly:

**Fidelity:** 800-343-0860 | **TIAA:** 800-842-2776.

### Step 2: Complete the Salary Reduction and/or Redirection Agreement (SRA)

After completion of Step 1, you must complete the SRA form on NESSIE, [https://nessie.uihr.uillinois.edu/cf/benefits/index.cfm?Item\\_ID=136](https://nessie.uihr.uillinois.edu/cf/benefits/index.cfm?Item_ID=136). On this form, you will indicate whether you wish to contribute a flat dollar amount or percentage of your salary to the 403(b) plan, and you will designate to which option(s) (pre-tax and/or Roth (post-tax)) you wish to contribute. Contributions into the 403(b) plan will not begin until the SRA has been submitted.

If you need assistance with the University SRA, please contact University Payroll and Benefits:

**Urbana:** 217-265-6363 | **Chicago:** 312-996-7200 | **Springfield:** 217-206-7144