Board of Regents — Arizona's Public Universities

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FIRST TIME – ENROLLING

To enroll in the Arizona University System (AUS) Voluntary 403(b) Savings Plan Account online follow these steps below.

Establish your Plan account

There are three steps to complete your enrollment. This process should take approximately **15 minutes**.

1. Go to www.netbenefits.com/aus
2. Click on *Enroll*
3. Select the *AUS Voluntary 403(b) Plan*
4. Click *Enroll Now*
5. Provide your personal information and your consent.
6. Select a Username and Password to access your account online and/or Log On.
7. Make decisions about contributions amounts and investments.

If you select TIAA-CREF as your retirement provider, you'll be directed to the TIAA-CREF website where you can finish your enrollment. You will need to establish a unique user ID and password for the TIAA-CREF website.

Complete your Enrollment

Once you enter the Fidelity NetBenefits® site you will be directed to the enrollment 'wizard' to guide you through the following steps to enroll.

Step 1 – Enroll Today

Click *Enroll Today* to enter the enrollment wizard.

On the page entitled, *Let's get started,*
Click *Begin*.

Step 2 – Select Contribution Amount

Select your Pre-Tax and/or Roth contribution amounts in dollars per pay period. Click *Continue*

Step 3 - Choose your Contribution Types

Choose the investments in the three contribution types, *Contributions, Employer Contributions & Rollovers*. Click *Choose investments.*

Choose how you want your contributions invested

Enter the percentage you'd like to invest in the options listed. Your choices must equal 100%

Select your choices for the two additional category *Employer Contribution* and the category *Rollovers*.

You must select a percentage that equals 100% for each category, *Contributions, Employer Contributions & Rollovers*.

When finished click *Continue*.

Step 4 - Choose how you would like to receive Plan Information

Click *I Consent* to receive plan information electronically or *I Do Not Consent* to receive plan information my mail.

Step 5 - Review and confirm your elections

If you are satisfied with your choices, choose *Submit.*

YOU ARE NOW ENROLLED!

Managing your Account

If you are a current participant in the AUS Voluntary 403(b) Savings Plan follow these steps to make changes to your account.

Change your contribution amount

To change the amount of your payroll contributions into your account:

1. Go to **www.netbenefits.com/aus** and log on with your Fidelity NetBenefits® username and password.
2. Select the *AZ Universities 403(b) Plan.*
3. Select *Quick Links* below the plan name Click *Contribution Amount*
4. Select *Contribution Amount and Catch-up Contributions*. Change Contribution Amount.
5. Confirm your new contribution dollar amount by Selecting *Change Contribution Amount*

Please note: Contribution changes can only be made online in Fidelity NetBenefits® or by calling Fidelity at 1-800-343-0860.

Choose or change your investment providers

You have two retirement providers to choose from; Fidelity Investments and TIAA-CREF. The investments selected will determine which investment provider you will choose.

1. Go to **www.netbenefits.com/aus** and log on with your Fidelity NetBenefits® username and password.
2. Select the *AZ Universities 403(b) Plan.*
3. Select *Quick Links* below the plan name Click *Contribution Amount*
4. Click *Retirement Provider.*
5. Click *Change Retirement Providers Elections.*

Changes can only be made online in Fidelity NetBenefits® or by calling Fidelity at 1-800-343-0860.

Change investments for your investment provider

You can change your investments directly with your selected investment provider.

To change how your future contributions are invested at Fidelity:

1. Go **to www.netbenefits.com/aus** and log on with your Fidelity NetBenefits® username and password.
2. Select the *AZ Universities 403(b) Plan.*
3. Select *Quick Links* below the plan name. Click *Change Investments.*
4. Select *Investments Elections*.
5. Under *Change your Investment Elections* choose one of the options available

To change how your future contributions are invested at TIAA-CREF:

1. Go to www.tiaa-cref.org/azustsa and log on with your TIAA-CREF user ID and password.
2. Under *I want to…* (located on the right side of the page) click *more.*
3. Click *Change My Investments*.

Update or designate your beneficiary

You will need to make beneficiary designation changes directly with your selected investment provider(s):

To designate your beneficiary for your Plan account at Fidelity:

1. Go to **www.netbenefits.com/aus** and log on with your username and password.
2. Scroll down to *Featured Resources.* Select *Make sure you have a beneficiary on File*.
3. Click *Get Started*.
4. Complete the section *Assign Beneficiaries to your Benefits.*

To designate your beneficiary for your Plan account at TIAA-CREF:

1. Go to www.tiaa-cref.org/azustsa
2. Log on with your TIAA-CREF user ID and password.
3. Under *I want to…*(located on the right side of the page) click *Update my beneficiaries*.

Need Help?

Call: Fidelity - 1-800-343-0860
TIAA-CREF - 1-800-842-2252
VALIC – 1-800-44-VALIC (82543)

Click: Fidelity - www.netbenefits.com/aus
TIAA-CREF - www.tiaa-cref.org/arizona
VALIC – www.valic.com

TIAA-CREF, VALIC, and Fidelity Investments are not affiliated.

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