

THE UNIVERSITY OF ARIZONA



FIRST TIME – ENROLLING

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

Establish Your Account

Follow the below steps to complete your enrollment. This process should take approximately 15 minutes.

1. Go to www.netbenefits.com/aus.
2. Click on the *Get Started* tab, then the *Enroll* link.
3. Select the *AUS Voluntary 403(b) Plan, #55468*.
4. Click *Enroll Now*.
5. Provide your personal information and your consent.
6. Select a Username and Password.
7. Follow the steps on the right to complete your enrollment.



Arizona University System
Voluntary 403(b) Plan

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.

Note: If you see a tile that says Retirement Savings (2 plans) click on the tile then select your AZ Universities 403(b) Plan.

Step 1 – Enroll

Click *Enroll* 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 - Select your Retirement Provider

You can choose to invest with Fidelity or TIAA, or invest a portion with both providers.

Choose how you want your contributions invested for your Contributions and Rollovers.

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

When finished, click *Continue*.

Step 4 - Review and confirm your elections

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

If you choose to invest at TIAA, you will be redirected to TIAA's website to choose your investment elections and set up your account.

You will need to establish a unique user ID and password for the TIAA website.

YOU ARE NOW ENROLLED!

Making changes to Your AUS Voluntary 403(b) Plan Account

Change your contribution amount

To change the amount of your payroll contributions into your account (for both TIAA and Fidelity):

1. Go to <https://nb.fidelity.com/public/nb/aus/home> and log on with your Fidelity NetBenefits® username and password.
2. After logging on, if you see a tile that says Retirement Savings (2 plans) click on the tile then select your AZ Universities 403(b) Plan. Otherwise, just select the *Quick Links* drop-down next to the *AZ Universities 403(b) Plan*.
3. Click *Contribution Amount*.
4. Click *Contribution Amount* again. Enter your desired **per-pay-period** contribution amounts (pre-tax and/or Roth).
5. Confirm your new contribution dollar amount by selecting *Change Contribution Amount*.
6. Review your Contribution Amount and Click *Submit*.

Note: Contribution Changes can only be made online in Fidelity Netbenefits or by calling Fidelity: **800-343-0860**.

Choose or Change Your Investment Provider

You have two retirement providers to choose from: Fidelity Investments and TIAA. (Choose both in Fidelity NetBenefits®)

1. Go to <https://nb.fidelity.com/public/nb/aus/home> and log on with your Fidelity NetBenefits® username and password.
2. Select the *AZ Universities 403(b) Plan*.
3. Select the *Quick Links* drop-down.
4. Click *Contribution Amount*.
5. Click *Retirement Provider*.
6. Click *Change Retirement Provider Elections*.

Complete Your Investments

Change your investments directly with your selected investment provider.

FIDELITY INVESTMENTS

1. Go to <https://nb.fidelity.com/public/nb/aus/home> and log on with your Fidelity NetBenefits® username and password.
2. Select the *AZ Universities 403(b) Plan*.
3. Select the *Quick Links* drop-down. Click *Change Investments*.
4. Under *Change Your Investment Elections*, choose from the options available.

TIAA

1. Go to <https://www.tiaa.org/arizona> and log in with your TIAA user ID and password.
2. Under *I want to...*(located on the right side of the page) click *More*.
3. Click *Change My Investments*.
4. Choose from the options available.

Designate or Change Your Beneficiaries

FIDELITY INVESTMENTS

1. Go to <https://nb.fidelity.com/public/nb/aus/home> and log on with your Fidelity NetBenefits® username and password.
2. Click the *Profile* tab.
3. Click *Beneficiaries*.

TIAA

1. Go to <https://www.tiaa.org/arizona>
2. Log in with your TIAA 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: **800-343-0860**
TIAA: **800-842-2252**

Click: Fidelity: <https://nb.fidelity.com/public/nb/aus/home>
TIAA: <https://www.tiaa.org/arizona>