

Retirement@Work

Retirement@Work is an online tool that helps simplify saving for retirement for eligible employees. Through the retirement platform employees can perform the following transactions from one website:

- Enroll in the Wesleyan University Retirement Plan.
- Select an investment provider(s) and research investments for all plan(s).
- View your Wesleyan University retirement plan balances.
- Change your voluntary contribution amounts.
- Access investment tools and calculators.

Note: For transactions other than enrolling or contribution changes such as beneficiary or investment changes, you can link to TIAA and Fidelity's main sites through Retirement@Work.

Retirement@Work

WESLEYAN
UNIVERSITY

**Welcome! We've made it easy to start managing
your retirement benefits.**



Simply log in with your user ID and password. If you're here for the first time, select **REGISTER NOW** to get started.

REGISTER NOW

Balances

WESLEYAN UNIVERSITY

LOG OUT

BALANCES CONTRIBUTIONS HISTORY EDUCATION & TOOLS

Balances

Total balance* for all plans at:
WESLEYAN UNIVERSITY
As of 01/05/2021 ** **\$2,161,371.00**

Balance information

Plan balances



- 2.00% WESLEYAN UNIVERSITY 457(B) PLAN
- 98.00% WESLEYAN UNIVERSITY RETIREMENT PLAN

Wesleyan University Retirement Plan \$2,126,791.40** <small>Balance as of 01/05/2021</small>				
INVESTMENT PROVIDER	YOUR CONTRIBUTION BALANCE	EMPLOYER CONTRIBUTION BALANCE	INVESTMENT PROVIDER TOTAL	LAST UPDATE
TIAA View details	\$908,173.10	\$1,171,737.89	\$1,876,910.79	01/05/2021
Fidelity View details	\$82,285.78	\$367,594.83	\$449,880.61	12/31/2020

Wesleyan University 457(b) Plan \$34,579.60** <small>Balance as of 01/05/2021</small>				
INVESTMENT PROVIDER	YOUR CONTRIBUTION BALANCE	EMPLOYER CONTRIBUTION BALANCE	INVESTMENT PROVIDER TOTAL	LAST UPDATE
TIAA View details	\$34,579.60		\$34,579.60	01/05/2021

Total balance* = \$2,161,371.00

Contributions

WESLEYAN UNIVERSITY

CONTRIBUTIONS HISTORY EDUCATION & TOOLS

Contributions

If you have not opened an account with an investment provider, please select the following provider's link to enroll: [TIAA Fidelity](#)

Welcome to the Wesleyan University Retirement Plan Online Salary Deferral and Enrollment site.

Wesleyan University will contribute 7% of your annual salary up to \$50,000, and 3% for earnings over \$50,000 for eligible faculty and staff members.
If you are a member of a bargaining unit, refer to your union contract.

Enter any contributions you made this year through a different employer to ensure you don't exceed the maximum amount allowed per year.

Summary

Stop voluntary contributions [MANAGE CONTRIBUTIONS](#)

YOUR CONTRIBUTIONS	12.00% per pay period
EMPLOYER CONTRIBUTIONS	Contributing
EFFECTIVE DATE	01/30/2021

Your Elections by Plan(s)

Wesleyan University Retirement Plan

EMPLOYEE PRE-TAX EMPLOYER 2.00% Contributing



50.00% TIAA
50.00% FIDELITY

Wesleyan University 457(b) Plan

EMPLOYEE PRE-TAX 10.00%



100.00% TIAA

Manage Contributions

WESLEYAN
CONTRIBUTIONS HISTORY EDUCATION & TOOLS

SET UP CONTRIBUTIONS

Let's set up your retirement contributions.

ⓘ Your employer is automatically contributing to your retirement.
Any amount you choose to contribute on this page is in addition to the required amount.

The Wesleyan University Retirement Plan allows you to contribute 1% to 85% of your annual earnings. You may contribute pre-tax or after tax (Roth).

To bypass all voluntary contributions, where you're able to choose investment providers for the mandatory plan sources, select:

CHOOSE PROVIDERS

Every year the IRS establishes a maximum amount you can contribute to your retirement plan. For 2021, the limit is \$18,500. Enter your prior contributions for this year and we'll track the total to help you stay within the limit.

Enter prior contributions

ⓘ You aren't contributing the maximum amount to your 401(k) plan, so you cannot currently enroll in or contribute to a 401(k) plan.

How much do you want to contribute to your retirement?

A percentage

AMOUNT PER PAY PERIOD:

20.00 % = \$6,000.00

Allocate between Pre-Tax and/or Roth contributions

When would you like to start making contributions?

First available paycheck

Future date

[Payroll Schedules \(PDF\)](#)

CANCEL **NEXT**

Choose Investment Providers

WELLYAN

CONTRIBUTIONS HISTORY EDUCATION & TOOLS

MANAGE CONTRIBUTIONS

Who would you like to handle your retirement investments?

You can choose either investment provider or both providers for your retirement accounts. Keep in mind that both providers offer different options, features, plan fees and levels of support.

You will need to open an account with the provider(s) you select on the provider website(s). A link to each provider's website will be included once your elections are confirmed.

Which provider fits you best?
[Research these investment providers](#)

Wesleyan University Retirement Plan

EE Plan

TIAA	50 %
Fidelity	50 %

TOTAL (must equal 100%) 100%

Employer

TIAA	50 %
Fidelity	50 %

TOTAL (must equal 100%) 100%

Wesleyan University 457(b) Plan

Employee Pre-Tax

TIAA	100 %
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TOTAL (must equal 100%) 100%

BACK NEXT

Review Your Contributions

WESLEYAN UNIVERSITY

CONTRIBUTIONS HISTORY EDUCATION & TOOLS

MANAGE CONTRIBUTIONS

Review your contributions

Please review all contributors before you confirm your elections.

Summary EDIT

YOUR CONTRIBUTIONS	30.00% per pay period
EMPLOYER CONTRIBUTIONS	Contributing
EFFECTIVE DATE	First available paycheck

Wesleyan University Retirement Plan

EMPLOYEE PRE-TAX 20.00%

50.00% TIAA
50.00% FIDELITY

EMPLOYER Contributing

50.00% TIAA
50.00% FIDELITY

Wesleyan University 457(b) Plan

EMPLOYEE PRE-TAX 10.00%

100.00% TIAA

! Your 457(b) contribution election will take effect at the start of the first pay period of the month following your chosen effective date or in accordance with your plan rules.

I have read and accept these [Terms and Conditions](#)

BACK CONFIRM

[Save & return later](#)

Terms & Conditions

Terms & Conditions

A. This Agreement shall be legally binding and will terminate or supersede any previous Code section 403(b) salary reduction agreements between the university and Employee.

B. The Employee grants permission to his or her 403(b) provider(s) to provide any information concerning Employee's 403(b) account(s) to the university that the university deems necessary for it to ensure that the 403(b) program is in compliance with all applicable federal and state laws, without the university's first obtaining additional written permission from the Employee for the provider(s) to release such information to the university.

C. In consideration for the salary reduction herein above provided, the university agrees to deposit the amount of salary reduction into a Code section 403(b) funding vehicle selected by the Employee and approved and made available by the university from time to time.

This Agreement is legally binding and irrevocable with respect to any compensation earned while the Agreement is in effect and shall continue in effect indefinitely until my salary reduction election is amended or terminated in accordance with the provisions of the Plans.

I may increase or decrease the amount of my salary deferral election during the Plan Year. I may change my direction regarding the investment allocation of both my employee and employer contributions at any time in accordance with procedures established by the Plan Administrator.

Please refer to the Summary Plan Descriptions or Executive Summaries for information regarding investment allocation and salary deferral changes or withdrawals allowed under the Plans.

CLOSE

Confirmation

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.

NEXT STEP: Open Your Investment Accounts
If you have not done so already, visit each provider you selected to open your account and customize your investment strategy.
Click the buttons below to do so.

[TIAA](#) [FIDELITY](#)

If you don't open an account with your chosen investment provider(s), your contributions will be directed to an age appropriate Target Benefit Fund with these providers(s).

Contributions Summary

YOUR CONTRIBUTIONS	30.00% per pay period
EMPLOYER CONTRIBUTIONS	Contributing
EFFECTIVE DATE	First available paycheck

[Your Elections by Plan\(s\)](#)

Wesleyan University Retirement Plan

EMPLOYEE PRE-TAX	20.00%		50.00% TIAA 50.00% FIDELITY
EMPLOYER	Contributing		50.00% TIAA 50.00% FIDELITY

Wesleyan University 457(b) Plan

EMPLOYEE PRE-TAX	10.00%		100.00% TIAA
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ⓘ Your 457(b) contribution election will take effect at the start of the first pay period of the month following your chosen effective date or in accordance with your plan rules.

[TAKE ME TO](#)

TIAA & Fidelity Websites

TIAA 

RETIREMENT BENEFITS | INVESTMENT OPTIONS | INSIGHTS | WHY TIAA

Your Retirement Benefits

[EXPLORE BENEFITS](#) [READY TO ENROLL](#)

RETIREMENT BENEFITS

Get to know your benefits

You can put away money for retirement, while saving on taxes. Find out what's available to you.

401(k) Plan	VIEW PLAN DETAILS
Retirement Plan	VIEW PLAN DETAILS
TIAA-CREF Retirement Healthcare Savings Plan	VIEW PLAN DETAILS

[Feedback](#)

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[Plans & Investments](#) [Tools & Resources](#) [Contact Us](#) [Meet with Us](#)

Get Ready for Your Future

Select Retirement@Work under My Information on WesPortal

[CLICK HERE to login to Fidelity NetBenefits if you already have an account with Fidelity and would like to make any changes.](#)

First Step Choose how much to save. Our calculator can help you determine what's right for you.	Learn More Explore the options of your workplace retirement savings plan.	Enroll Today Select Retirement@Work under My Information on WesPortal.
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[Go](#) [Go](#) [Go](#)

Make Updates to My Account

Change My Contributions Select Retirement@Work under My Information on WesPortal	Change My Investments Update my fund choices to help meet my financial goals. Login now.	Get Help with My Finances It's complimentary, thanks to your employer. Talk with a retirement planner to get help with your financial goals.
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[View All Tools & Resources](#)

Next Steps

 Call Call for a consultation to discuss and plan for your retirement needs. Fidelity 800-343-0860	 Meet Meet to discuss and plan for your retirement needs - right at work.
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History – Contribution Changes

CONTRIBUTION CHANGES ▾

Contribution changes

 Please note that we may not be able to display the most recent information on this page. Refer to your investment provider's website for a complete list of contribution changes.

See salary deferrals and changes to your investment providers from the past three months. Use the filter to see changes from the past 24 months. **SHOW FILTERS +**

EFFECTIVE DATE ▲	PLAN NAME ▲	PLAN NUMBER ▲	STATUS ▲	DATE MODIFIED ▲	MODIFIED BY ▲
 01/13/2021	Wesleyan University Retirement Plan	151200	ACTIVE	01/13/2021	SYSTEM
Contribution: 11% of each paycheck		Effective date: 01/13/2021			
Employer <u>Contributing</u>		10% Employee Pretax	1% Roth		
50% TIAA		50% TIAA	50% TIAA		
50% Fidelity		50% Fidelity	50% Fidelity		
 01/13/2021	Wesleyan University 457(b) Plan	102153	ACTIVE	01/13/2021	SYSTEM

History - Contribution History

CONTRIBUTION HISTORY ▾

Contribution History

i For your information, we may not be able to display the most recent contributions on this page. Refer to your investment provider's website for a complete list of contributions made to each provider.

SUMMARY **DETAILS**

This is a listing of your contributions over the past three months. You may use the filter to find your contributions over the past 24 months. SHOW FILTERS +

PAYROLL DATE ▾	PLAN ▾	CONTRIBUTION TYPE ▾	INVESTMENT PROVIDER ▾	AMOUNT ▾
01/13/2021	Wesleyan University 457(b) Plan	Employee Pre-Tax	TIAA	+\$1,000.00
- 01/13/2021	Wesleyan University Retirement Plan	Employee Pre-Tax	(Multiple providers)	-\$2,000.00
			TIAA	+\$1,000.00
			Fidelity	+\$1,000.00
+ 01/13/2021	Wesleyan University Retirement Plan	Employer	(Multiple providers)	+\$1,000.00
+ 01/13/2021	Wesleyan University Retirement Plan	Roth	(Multiple providers)	+\$2,000.00

This page displays information shared by your investment provider. Please refer to your investment provider's website for the most current information.

History - Contribution History Summary

WESLEYAN UNIVERSITY

LOG OUT

CONTRIBUTIONS HISTORY EDUCATION & TOOLS

CONTRIBUTION HISTORY

Contribution History

Please note that we may not be able to display the most recent contributions on this page. Refer to your investment provider's website for a complete list of contributions made to each provider.

SUMMARY DETAILS

2021 YTD Contributions for All Plans	\$6,500.00
YOUR CONTRIBUTIONS	\$5,000.00
EMPLOYER CONTRIBUTION	\$1,500.00

This page displays information shared by your investment provider. Please refer to your investment provider's website for the most current information.

Education & Tools

The screenshot displays the 'Education & Tools' section of the Wesleyan University Retirement Plan website. At the top, there is a navigation bar with 'CONTRIBUTIONS', 'HISTORY', and 'EDUCATION & TOOLS' (the active tab). The 'WESLEYAN' logo is in the top left, and 'LOG OUT' is in the top right. Below the navigation bar, the main heading is 'Education & Tools'. A introductory paragraph states: 'It's never too soon to start planning your financial future. These easy-to-understand articles on retirement and financial basics can help you set goals and stay on track.' Under the heading 'ELIGIBLE PLANS', there are two expandable items: '+ Wesleyan University Retirement Plan' and '+ Wesleyan University 457(b) Plan'. Below this, the 'TOOLS & RESOURCES' section features two cards. The first card, 'Custom Contribution Calculator', includes a calculator icon and a 'LEARN MORE' button. The second card, '360° Financial View', includes a globe icon and a 'LEARN MORE' button.

WESLEYAN

CONTRIBUTIONS HISTORY **EDUCATION & TOOLS** LOG OUT

Education & Tools

It's never too soon to start planning your financial future. These easy-to-understand articles on retirement and financial basics can help you set goals and stay on track.

ELIGIBLE PLANS

- + Wesleyan University Retirement Plan
- + Wesleyan University 457(b) Plan

TOOLS & RESOURCES


Custom Contribution Calculator
Find out how changing your contribution amount can affect your paycheck now and retirement later.
[LEARN MORE](#)


360° Financial View
Monitor all of your finances and set financial goals.
[LEARN MORE](#)

Education & Tools

⊖ Wesleyan University Retirement Plan

Wesleyan contributions are tax-deferred, meaning your investments can grow before being taxed as income when distributed. You can invest the employer funds in mutual funds, fixed annuities or variable annuities.

Investment choices

When it comes to investing for retirement, you have options. Learn about the investments in your plan, so you can make choices that help you meet your retirement goals.

[Research Your Investment Options](#)

Investment providers

You can choose either investment provider or both providers when you enroll for this plan:

[TIAA](#)

[Fidelity](#)

History - Communications

COMMUNICATIONS ▾

Communications

See salary deferrals and changes to your investment providers from the past three months. Use the filter to see changes from the past 24 months. **SHOW FILTERS +**

DATE	DOCUMENT NAME	PLAN(S) INCLUDED
02/02/2021	Prior Contribution Notification (PDF)	
01/25/2021	Salary Deferral Confirmation (PDF)	Wesleyan University Retirement Plan

Retirement@Work

RETIREMENT@work®

Quick Start Guide

Everything for your Wesleyan University Retirement Plan.
In one location.

Welcome to Retirement@Work®, where you can:

- Enroll in your retirement 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

Need Help?

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), over the phone or virtually.

- TIAA: **800-732-8353**
- Fidelity: **800-642-7131**

General plan questions

Call the Human Resources Department at **860-685-2100**, 9 a.m. to 4:30 p.m. (ET) or email benefits@wesleyan.edu.

Learn more

Visit wesleyan.edu/hr/careers/benefits.html.

[This short video](#) provides a step-by-step visual guide to using Retirement@Work.

RETIREMENT@work®

