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.
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.
Balances

Total balance* for all plans at:
WESLEYAN UNIVERSITY
$2,161,371.00

Balance information

Plan balances

2.00% Wesleyan University 457(b) Plan
96.90% Wesleyan University Retirement Plan

Wesleyan University Retirement Plan
$2,126,791.40**
Balance as of 01/05/2021

<table>
<thead>
<tr>
<th>INVESTMENT PROVIDER</th>
<th>YOUR CONTRIBUTION BALANCE</th>
<th>EMPLOYER CONTRIBUTION BALANCE</th>
<th>INVESTMENT PROVIDER TOTAL</th>
<th>LAST UPDATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>TIAA</td>
<td>$808,173.10</td>
<td>$1,171,737.69</td>
<td>$1,979,910.79</td>
<td>01/05/2021</td>
</tr>
</tbody>
</table>

Fidelity
$62,263.78
$567,594.83
$629,858.61
12/31/2020

Wesleyan University 457(b) Plan
$34,579.60**
Balance as of 01/05/2021

<table>
<thead>
<tr>
<th>INVESTMENT PROVIDER</th>
<th>YOUR CONTRIBUTION BALANCE</th>
<th>EMPLOYER CONTRIBUTION BALANCE</th>
<th>INVESTMENT PROVIDER TOTAL</th>
<th>LAST UPDATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>TIAA</td>
<td>$34,579.60</td>
<td></td>
<td>$34,579.60</td>
<td>01/05/2021</td>
</tr>
</tbody>
</table>

Total balance** = $2,161,371.00
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 $60,000, and 10% for earnings over $60,000 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**

<table>
<thead>
<tr>
<th>YOUR CONTRIBUTIONS</th>
<th>12.00% per pay period</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMPLOYER CONTRIBUTIONS</td>
<td>Contributing</td>
</tr>
<tr>
<td>EFFECTIVE DATE</td>
<td>01/30/2021</td>
</tr>
</tbody>
</table>

**Your Elections by Plan(s)**

- **Wesleyan University Retirement Plan**
  - EMPLOYEE PRE-TAX
  - 2.00% Contributing
  - 50.00% TIAA
  - 50.00% Fidelity

- **Wesleyan University 457(b) Plan**
  - EMPLOYEE PRE-TAX
  - 10.00%
  - 300.00% TIAA
Manage 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 Waseda University Retirement Plan allows you to contribute 1% to 65% of your annual earnings. You may contribute pre-tax or after-tax (Roth).

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

Choosing Providers

Every year, the IRS establishes a maximum amount you can contribute to your retirement plan. For 2023, 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 403(b) plan, so you cannot currently enroll in or contribute to a 403(b) plan.

How much do you want to contribute to your retirement?

A percentage

AMOUNT PER PAY PERIOD:

20.00 % = $8,000.00

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

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

<table>
<thead>
<tr>
<th>Provider</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>TIAA</td>
<td>50 %</td>
</tr>
<tr>
<td>Fidelity</td>
<td>50 %</td>
</tr>
</tbody>
</table>

TOTAL must equal 100%: 100%

Wesleyan University 403(b) Plan

<table>
<thead>
<tr>
<th>Provider</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>TIAA</td>
<td>100 %</td>
</tr>
</tbody>
</table>

TOTAL must equal 100%: 100%
Review Your Contributions
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.
Confirmation

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.

TIAA
FIDELITY

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
30.00%

EMPLOYER
Contributing

Wesleyan University 401(k) Plan

EMPLOYEE PRE-TAX
50.00%

EMPLOYEE PRE-TAX
30.00%

FIDELITY

Take me to
TIAA & Fidelity Websites
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.

<table>
<thead>
<tr>
<th>EFFECTIVE DATE</th>
<th>PLAN NAME</th>
<th>PLAN NUMBER</th>
<th>STATUS</th>
<th>DATE MODIFIED</th>
<th>MODIFIED BY</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/13/2021</td>
<td>Wesleyan University Retirement Plan</td>
<td>151200</td>
<td>ACTIVE</td>
<td>01/13/2021</td>
<td>SYSTEM</td>
</tr>
</tbody>
</table>

Contribution: 11% of each paycheck
Effective date: 01/13/2021

Employer | Contributing
---|---
10% Employee Pretax | 1% Roth
50% TIAA | 50% TIAA
50% Fidelity | 50% Fidelity

<table>
<thead>
<tr>
<th>EFFECTIVE DATE</th>
<th>PLAN NAME</th>
<th>PLAN NUMBER</th>
<th>STATUS</th>
<th>DATE MODIFIED</th>
<th>MODIFIED BY</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/13/2021</td>
<td>Wesleyan University 401(k) Plan</td>
<td>102153</td>
<td>ACTIVE</td>
<td>01/13/2021</td>
<td>SYSTEM</td>
</tr>
</tbody>
</table>
History - Contribution History

<table>
<thead>
<tr>
<th>Payroll Date</th>
<th>Plan</th>
<th>Contribution Type</th>
<th>Investment Provider</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/13/2021</td>
<td>Wesleyan University 403(b) Plan</td>
<td>Employee Pre-Tax</td>
<td>TIA</td>
<td>+$1,000.00</td>
</tr>
<tr>
<td>01/13/2021</td>
<td>Wesleyan University Retirement Plan</td>
<td>Employee Pre-Tax</td>
<td>TIA, Fidelity</td>
<td>+$2,000.00</td>
</tr>
<tr>
<td></td>
<td>Wesleyan University Retirement Plan</td>
<td>Employer</td>
<td>(Multiple providers)</td>
<td>+$1,000.00</td>
</tr>
<tr>
<td></td>
<td>Wesleyan University Retirement Plan</td>
<td>Roth</td>
<td>(Multiple providers)</td>
<td>+$2,000.00</td>
</tr>
</tbody>
</table>

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

**Contribution History**

- **2021 YTD Contributions for All Plans**: $6,500.00
- **Your Contributions**: $5,000.00
- **Employer Contribution**: $1,500.00

Note: This page displays information shared by your investment provider. Please refer to your investment provider’s website for the most current information.
Education & Tools

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.
- 360° Financial View: Monitor all of your finances and set financial goals.
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

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.

<table>
<thead>
<tr>
<th>DATE</th>
<th>DOCUMENT NAME</th>
<th>PLAN(S) INCLUDED</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/02/2021</td>
<td>Prior Contribution Notification (PDF)</td>
<td></td>
</tr>
<tr>
<td>01/25/2021</td>
<td>Salary Deferral Confirmation (PDF) Wesleyan University Retirement Plan</td>
<td></td>
</tr>
</tbody>
</table>
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.