How to Access and Manage Your Santa Clara University Retirement Plan Accounts Online with NetBenefits®

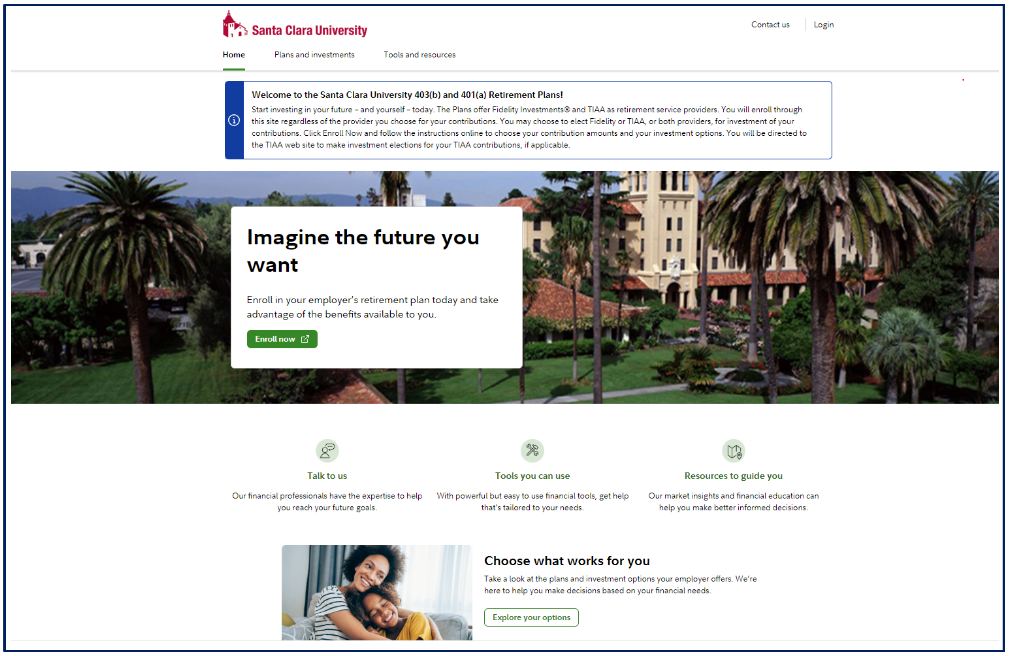
SANTA CLARA UNIVERSITY

How to Access and Manage Your Santa Clara University (SCU) Retirement Plan Accounts Online

Your SCU Retirement Plans are important benefits, so you need the right information, resources, and support to help you make decisions with confidence.

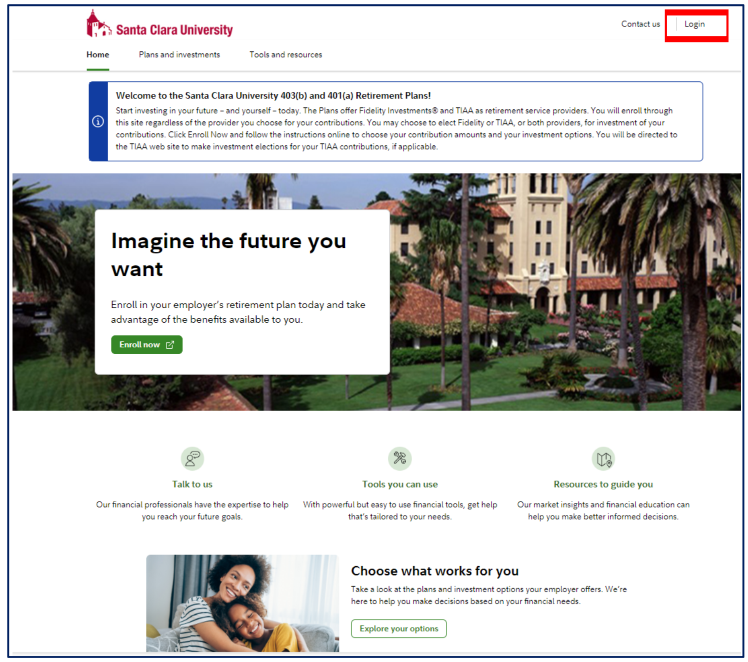
You can visit the website at **www.netbenefits.com/scu** to view plan details, access tools and calculators, and log on to your NetBenefits® account to make updates. You can also call the Fidelity Retirement Service Center at **800-343-0860**.

All active and eligible employees and plan participants may log on to NetBenefits at any time. NetBenefits is where you will enroll, make retirement provider elections, and make changes to your deferral election.



How to Log On to Your NetBenefits Account

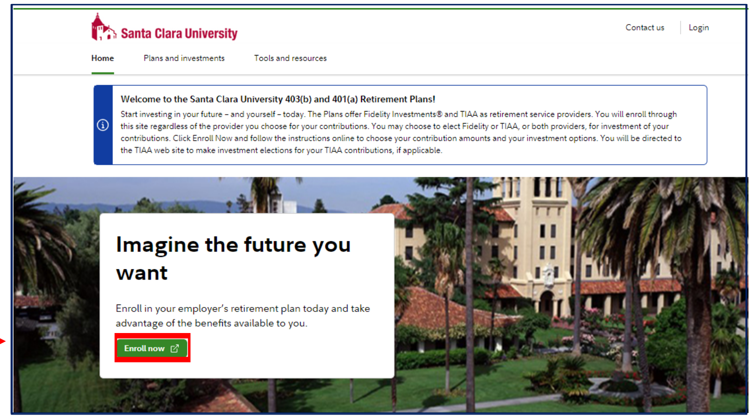
- **Log on** to your NetBenefits account at www.netbenefits.com/scu.



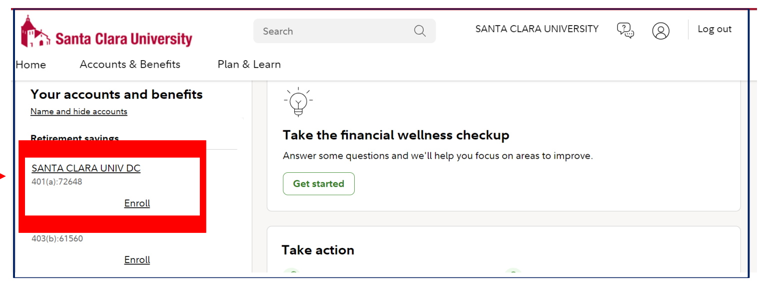
- If you are a current Fidelity customer or already have a NetBenefits username and password, you can continue to use them to log on to your NetBenefits account.
- At the top right of the home page, select the *Login* button and enter your NetBenefits username and password.
- If you *have not* previously set up a NetBenefits username and password, you will need to register to create a username and password in order to access your NetBenefits account.
  - Click *Register as a new user* in the *Login* page box, and follow the prompts to establish a username and password.
- If you are a current Fidelity customer or *already have* a NetBenefits username and password, but you have forgotten your NetBenefits username and/or password, you will need to reset your username and password in order to access your NetBenefits account.
  - Click *Forgot username or password* at the top of the home page within the *Login* box, and follow the prompts to reset your username or password.
- When you log on to NetBenefits, you'll be asked to provide your email address and mobile phone number.

How to Select your Service Provider for the SCU DC 401(a) Plan

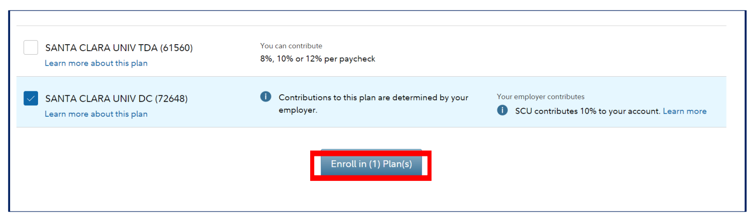
- Click *Enroll Now* at www.netbenefits.com/scu.
- Follow the prompt to log into your account (see prior page to set up your **Login**.)



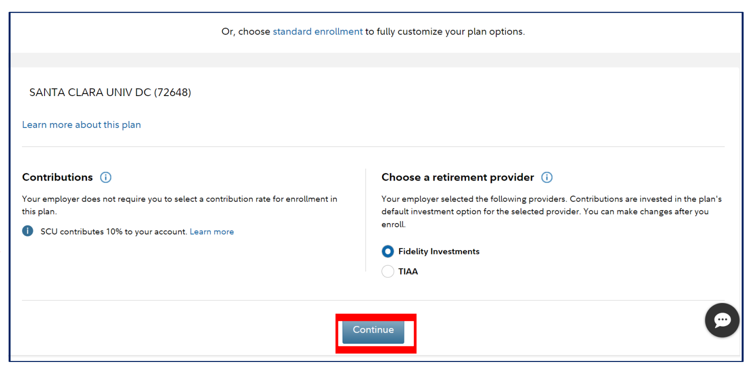
- Click *Enroll* for the DC/401(a) plan 72648.



- Select the box for the DC/401(a) plan and click *Enroll in (1) Plan.*

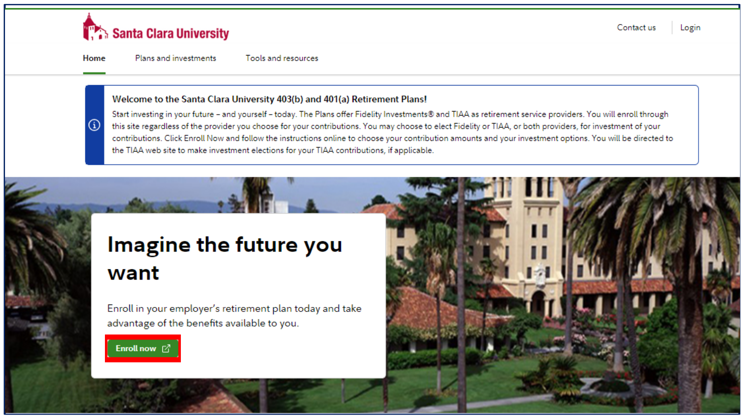


- Select your service provider and click *Continue*. Click *Enroll in (1) Plan* to confirm your selection.

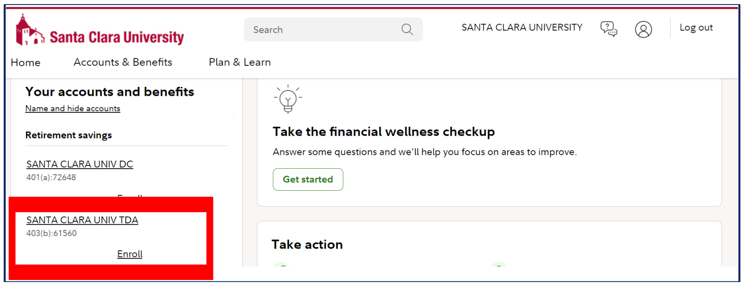


How to Enroll in your SCU TDA/403(b) Plan and Select your Service Provider

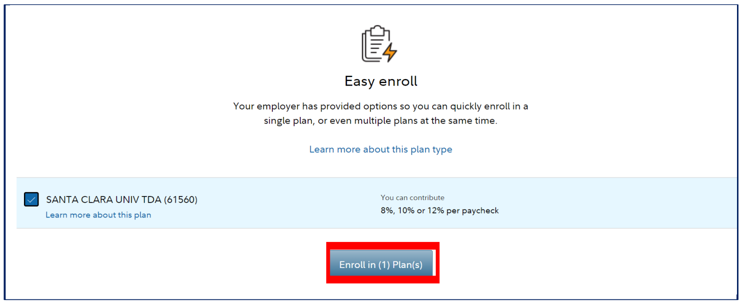
- Click *Enroll Now* at www.netbenefits.com/scu.
- Follow the prompt to log into your account (see prior page to set up your **Login**.)



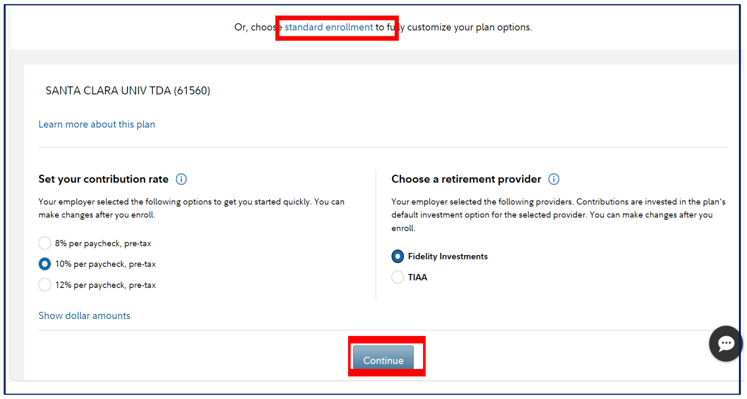
- Select the TDA/403(b) plan 61560 and click *Enroll.*



- Select the TDA/403(b) plan 61560 and click *Enroll in (1) Plan*



- Select your contribution rate and service provider. Click *Continue*. Confirm your selection by clicking *Enroll in (1) Plan*.

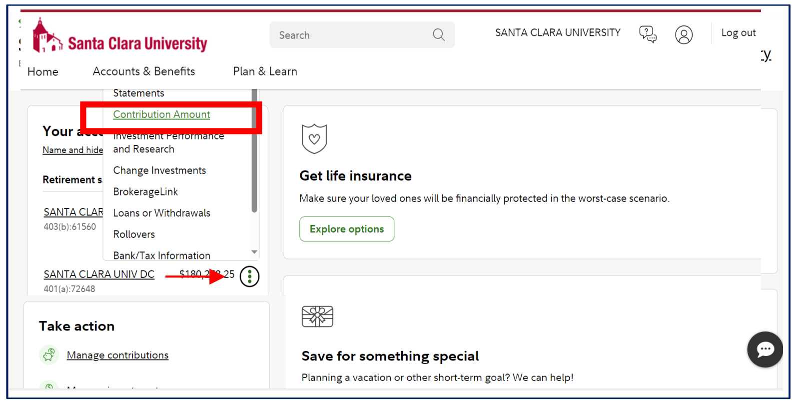


If you prefer to enroll through *Standard Enrollment*, click the link at the top of the screen.

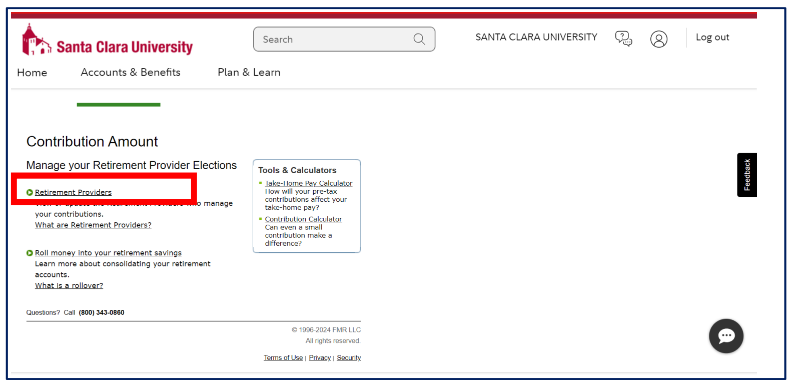
How to Change Your Retirement Provider

If you are **currently participating** in the SCU Retirement Plans, you can change where your contributions are directed online on NetBenefits:

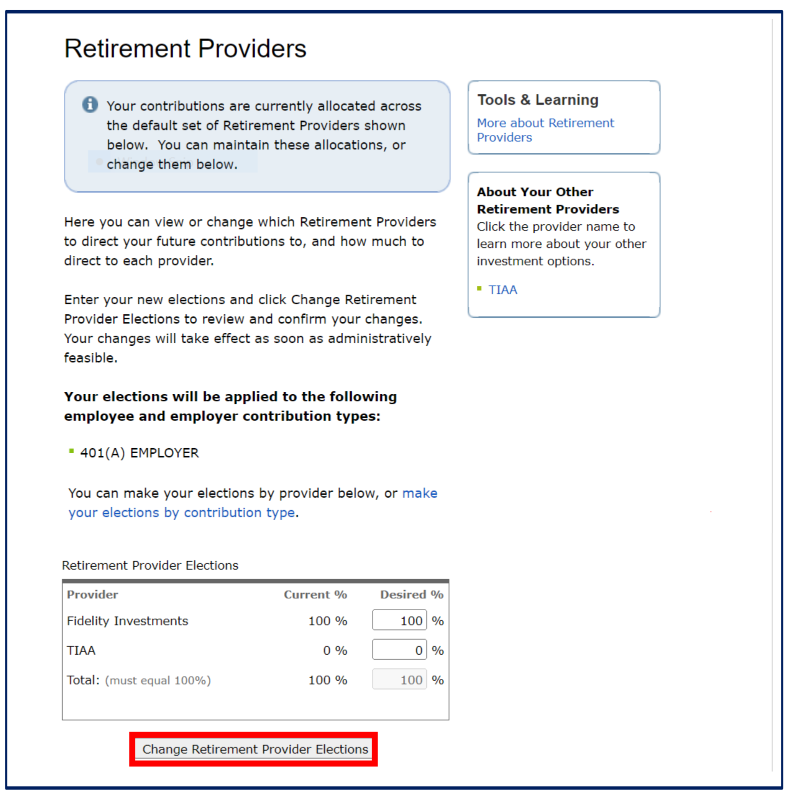
- *Log on* to your NetBenefits account at www.netbenefits.com/scu.
- From the home page, click the three dots to bring up the drop-down menu next to the plan name for which you want to change the retirement provider and select *Contribution Amount*.



- Click on the *Retirement Providers* link.



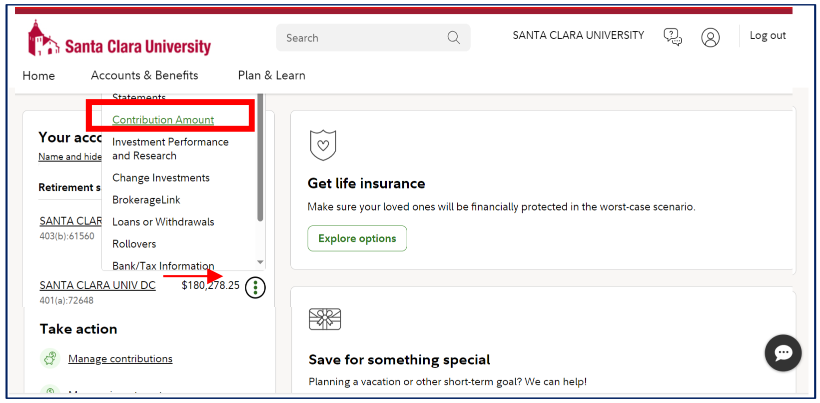
- Follow the screens to change your retirement provider. YYou can select either provider or both.
- Click *Change Retirement Provider Elections* to submit your changes.



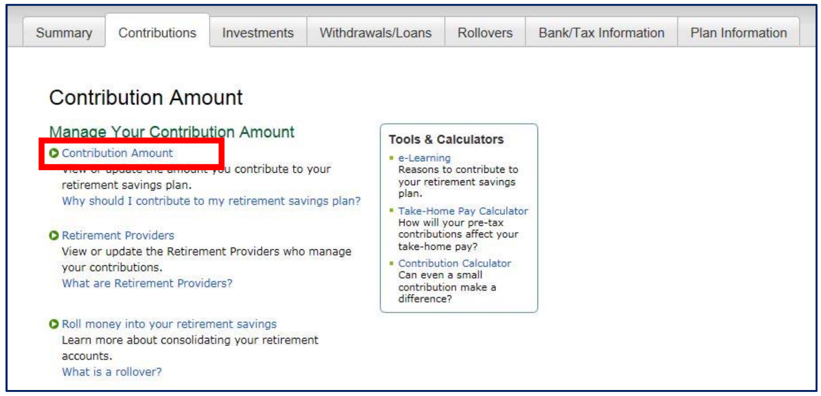
How to Change Your SCU 403(b) Deferral Amount

If you are **currently contributing** to the SCU 403(b) Retirement Plan, you can change your deferral amount online on NetBenefits:

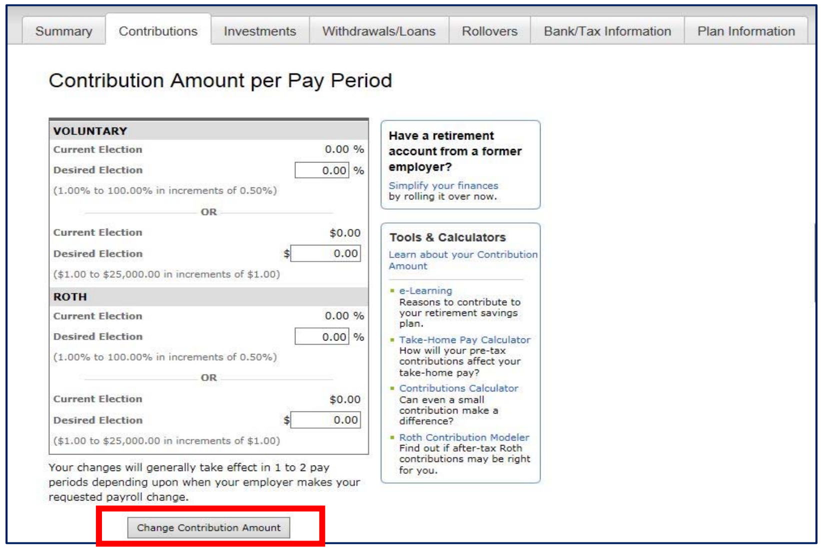
- **Log on** to your NetBenefits account at www.netbenefits.com/scu.
- From the home page, select the three dots to bring up the drop-down menu next to the plan name for which you want to change the retirement provider and select *Contribution Amount*.



- Click on the *Contribution Amount* link.

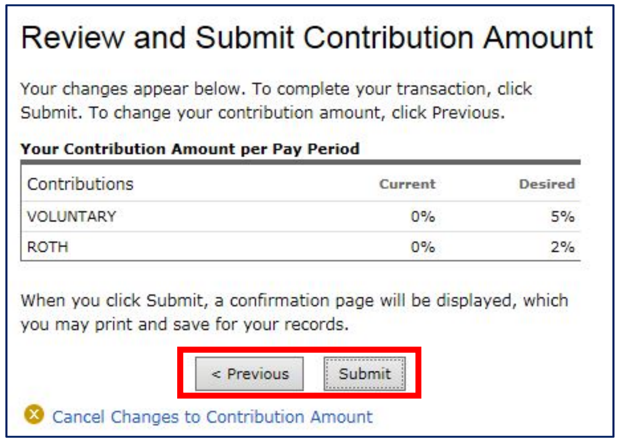


- Enter the desired election amount. Click *Change Contribution Amount*.

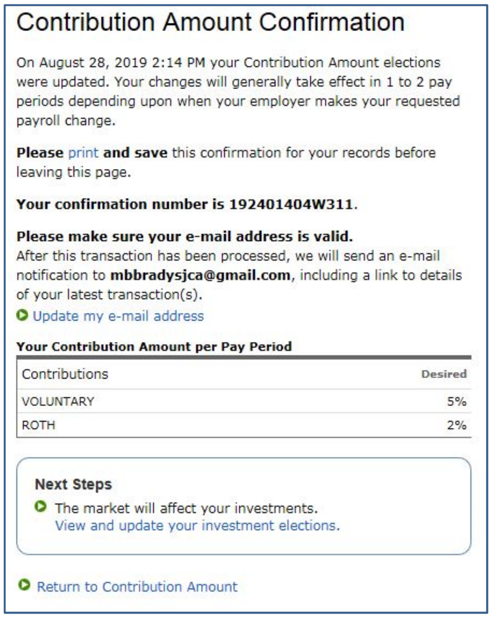


How to Change Your SCU 403(b) Deferral Amount, continued

- *Review and Submit* the change. Click *Submit*.



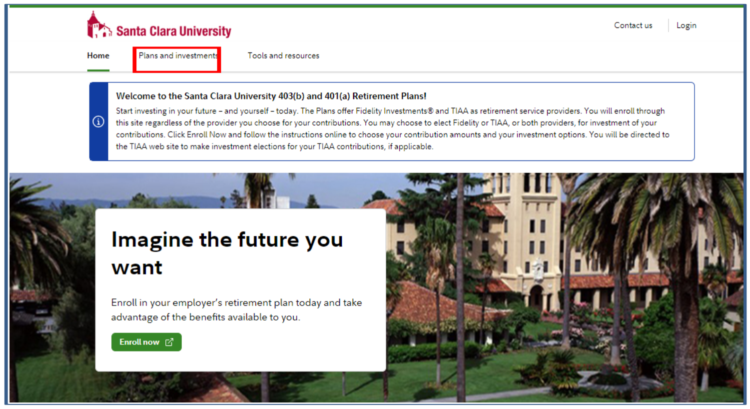
- *Contribution Amount Confirmation* will appear for you to print for your records.



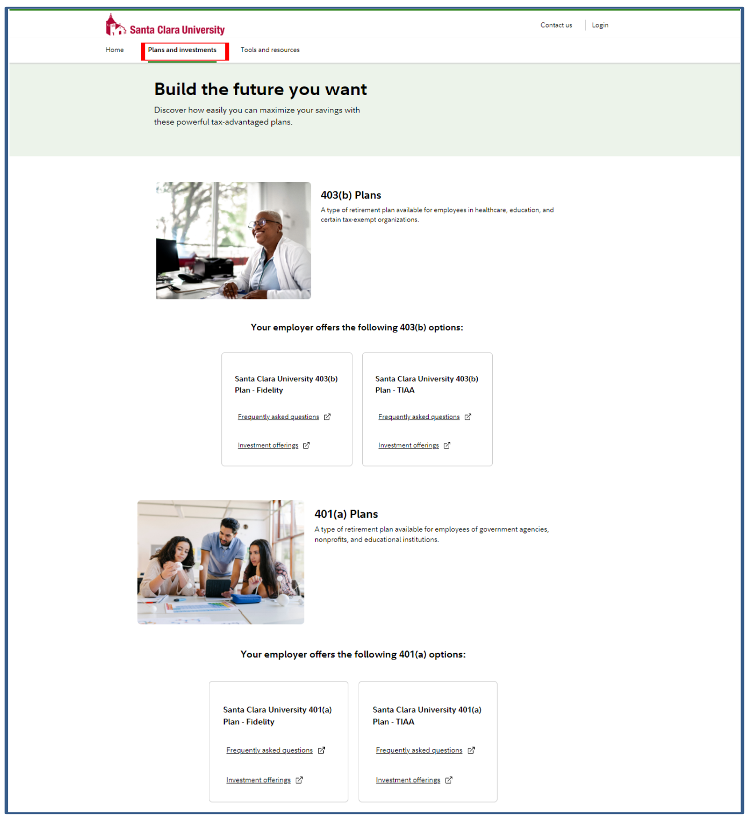
How to Learn about your SCU 403(b) and 401(a) Plans with Fidelity or TIAA

Review the Frequently Asked Questions link to learn about your plans. To learn about your investment options, click Investment Options for both Fidelity and TIAA.

- Log on to your account at www.netbenefits.com/scu.
- Select *Plans and investment* to learn more about the SCU plans and investment options for your Fidelity or TIAA accounts



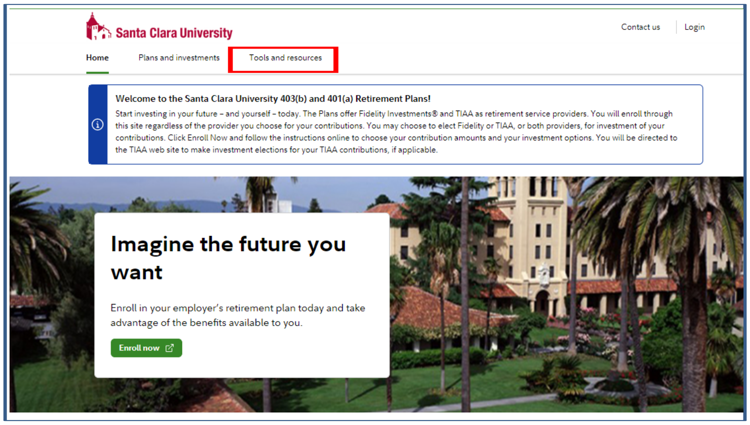
- Review information about the 403(b) Plan or 401(a) Plan.
- Select either Fidelity information or TIAA information.



How to Access Tools and Resources

You can access practical education, easy-to-use tools, and innovative resources and insights to help you make informed decisions.

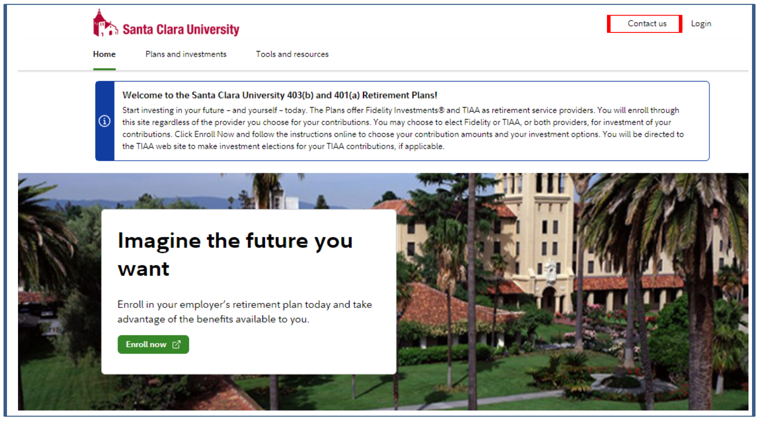
- Log on to your account at www.netbenefits.com/scu.
- Select the *Tools and resources* tab to review resources available to you



How to Contact a Representative at Fidelity or TIAA

We are here to help you no matter how you would like to get in touch.

- Log on to your account at www.netbenefits.com/scu.
- Select the *Contact us* tab to call, schedule a time to meet, or log in to your Fidelity or TIAA accounts.



Go Mobile App

- *Download the NetBenefits® Mobile App* to check balances and account performance, select investment options, or change balances among investments and more!

NetBenefits® smartphone and iPad® app

Need Help?

Call 800-343-0860 to speak with a Fidelity Representative.

Visit www.netbenefits.com/scu to view plan details and account access links to the SCU retirement providers.

Investing involves risk, including risk of loss.

Screenshots are for illustrative purposes only.

The third parties mentioned herein and Fidelity Investments are independent entities and are not legally affiliated.

System availability and response times may be subject to market conditions.

Fidelity Brokerage Services LLC, Member NYSE, SIPC, 900 Salem Street, Smithfield, RI 02917