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<sup>®</sup> 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.
- o 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 user name 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

<ul> <li>o Click <i>Enroll Now</i> at www.netbenefits.com/scu.</li> <li>o Follow the prompt to log into your account (see prior page to set up your Login.)</li> </ul>	<page-header></page-header>
o Click <i>Enroll</i> for the DC/401(a) plan 72648.	Santa Clara University     Search     SANTA CLARA UNIVERSITY     Image: Clara
o Select the box for the DC/401(a) plan and click <i>Enroll in (1) Plan.</i>	SANTA CLARA UNIV TDA (61560)     You can constitute 8%, 10% or 12% per paycheck.       SANTA CLARA UNIV DC (72648)     Contributions to this plan are determined by your     Your employer contributes       Learn more about this plan     O Contributions to this plan are determined by your     Your employer contributes       Learn more about this plan     Enroll im (1) Plan(o)     SCU contributes 10% to your account, Learn more
o Select your service provider and click <i>Continue</i> . Click <i>Enroll in (1) Plan</i> to confirm your selection.	Or, choose standard enrollment to fully customize your plan options.         SANTA CLARA UNIV DC (72648)         Learn more about this plan         Contributions ()         Your employer does not require you to select a contribution rate for enrollment in the plan.         Image: SQL contributes 10% to your account. Learn more         Choose a retirement provider ()         Image: SQL contributes 10% to your account. Learn more         Image: SQL contributes 10% to your account. Learn more
,	Continue

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



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:

Santa Clara University

Home

Accounts & Benefits

Contribution Amount

Statements

Search

Plan & Learn

- 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*.
- o Click on the *Retirement Providers* link.

o Follow the screens to change your

either provider or both.

retirement provider. YYou can select

o Click Change Retirement Provider

*Elections* to submit your changes.

Your (O Name and hide and Research Retirement s Get life insurance BrokerageLink Make sure your loved ones will be financially protected in the worst-case scenario SANTA CLAR Loans or Withdrawals Explore options Rollovers Bank/Tax Information SANTA CLARA UNIV DC \_\_\$180,2 R Take action 9 Anage contributions Save for something special Planning a vacation or other short-term goal? We can help Search SANTA CLARA UNIVERSITY Log out 🐘 Santa Clara University Accounts & Benefits Plan & Learn Contribution Amount Manage your Retirement Provider El Tools & Calculators eedback Take-Home Pay Calculat How will your pre-tax contributions affect you take home pay? O Retirement Providers your contributions. What are Retirement Providers? Roll money into your retirement savings
 Learn more about consolidating your reti accounts. What is a rollover stions? Call (800) 343-086 © 1996-2024 FMR LLC erms of Use | Privacy | Security **Retirement Providers Tools & Learning** 1 Your contributions are currently allocated across More about Retirement the default set of Retirement Providers shown below. You can maintain these allocations, or Providers change them below. About Your Other **Retirement Providers** Here you can view or change which Retirement Providers Click the provider name to to direct your future contributions to, and how much to learn more about your other direct to each provider. investment options TIAA Enter your new elections and click Change Retirement Provider Elections to review and confirm your changes. Your changes will take effect as soon as administratively feasible. Your elections will be applied to the following employee and employer contribution types: 401(A) EMPLOYER You can make your elections by provider below, or make your elections by contribution type. Retirement Provider Elections Provider Current % Desired % 100 % Fidelity Investments 100 % TIAA 0 % 0 % Total: (must equal 100%) 100 % 100 % Change Retirement Provider Elections

Log out

Y

SANTA CLARA UNIVERSITY

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# 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.

👘 Santa Clara University	Search	Q	SANTA CLARA UNIVERSITY	P. (2	) Log out
Home Accounts & Benefits Plan &	Learn				
Statement           Contribution Amount           Your accc           Name and hide           and Research           Retirements           BrokerageLink           SANTA CLAF           403(b):61560           Rollovers	Get life insurance Make sure your loved of Explore options	<b>Ce</b> ones will be finance	ially protected in the worst-cas	e scenario.	
SANTA CLARA UNIV DC 401(a):72648 Take action					
Manage contributions	Save for somether Planning a vacation or	other short-term	goal? We can help!		9

o Click on the *Contribution Amount* link. Summary Contributions Investments Withdrawals/Loans Rollovers Bank/Tax Information Plan Information **Contribution Amount** Manage Your Contribution Amount Tools & Calculators O Contribution Amount e-Learning Reasons to contribute to your retirement savings plan. u contribute to your retirement savings plan Why should I contribute to my retirement savings plan? Pian. Take-Home Pay Calculator How will your pre-tax contributions affect your take-home pay? O Retirement Providers View or update the Retirement Providers who manage Contribution Calculator Can even a small contribution make a difference? your contributions. What are Retirement Providers? Roll money into your retirement savings Learn more about consolidating your retirement accounts. What is a rollover? o Enter the desired election amount. Click Summary Contributions Investments Withdrawals/Loans Rollovers Bank/Tax Information Plan Information Change Contribution Amount. Contribution Amount per Pay Period VOLUNTARY Have a retirement urrent Electi 0.00 % account from a former Desired Election employer? 0.00 % Simplify your finances by rolling it over now. (1.00% to 100.00% in increments of 0.50%) OP Current Election \$0.00 Tools & Calculators Desired Election 0.00 Learn about your Contribu Amount (\$1.00 to \$25.000.00 in increments of \$1.00) e-Learning Reasons to contribute to your retirement savings plan. ROTH Current Election 0.00 % plan. Take-Home Pay Calculator How will your pre-tax contributions affect your take-home pay? Contributions Calculator Can even a small contribution make a difference? **Desired** Election 0.00 % (1.00% to 100.00% in increments of 0.50%) OR Current Election \$0.00 **Desired Election** \$ 0.00 Roth Contribution Modeler Find out if after-tax Roth contributions may be right for you. (\$1.00 to \$25,000.00 in increments of \$1.00) Your changes will generally take effect in 1 to 2 pay periods depending upon when your employer makes your requested payroll change. Change Contribution Amount

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

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

### Review and Submit Contribution Amount

Your changes appear below. To complete your transaction, click Submit. To change your contribution amount, click Previous.

#### Your Contribution Amount per Pay Period

Contributions	Current	Desired
VOLUNTARY	0%	5%
ROTH	0%	2%

When you click Submit, a confirmation page will be displayed, which you may print and save for your records.

	< Previous	Submit
Cancel Change	s to Contribution	Amount

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

#### **Contribution Amount Confirmation**

On August 28, 2019 2:14 PM your Contribution Amount elections were updated. Your changes will generally take effect in 1 to 2 pay periods depending upon when your employer makes your requested payroll change.

 $\ensuremath{\textbf{Please print}}$  and  $\ensuremath{\textbf{save}}$  this confirmation for your records before leaving this page.

Your confirmation number is 192401404W311.

#### Please make sure your e-mail address is valid. After this transaction has been processed, we will se

After this transaction has been processed, we will send an e-mail notification to **mbbradysica@gmail.com**, including a link to details of your latest transaction(s). © Update my e-mail address

#### Your Contribution Amount non Day Devied

Contributions	Desired
VOLUNTARY	5%
ROTH	2%
Next Steps	
O The market will affect your investments	

• Return to Contribution Amount

### 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.

- o 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



- o Review information about the 403(b) Plan or 401(a) Plan.
- o 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.

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

- o 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*<sup>®</sup> *Mobile App* to check balances and account performance, select investment options, or change balances among investments and more!



### 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.

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