

QUICK START GUIDE

Everything for your employer's retirement plans.
In one location.

WELCOME TO RETIREMENT@WORK[®], WHERE YOU CAN:

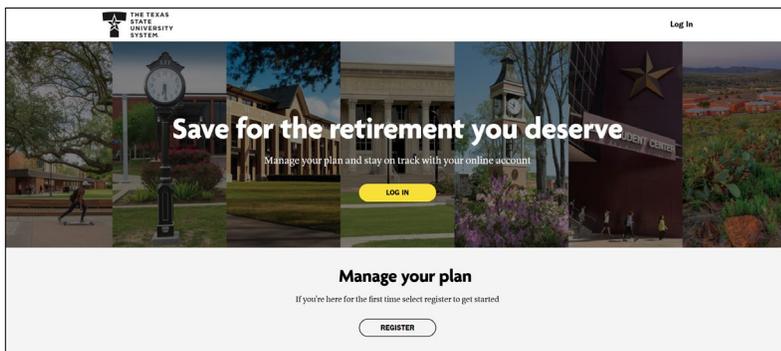
- Enroll in your retirement plan(s)
- Choose your ORP and TDA preferred retirement plan provider(s)
- Change your TDA contribution amounts at any time
- View retirement plan balances across plans and investment providers
- Access investment tools and resources for planning

1. ACCESS RETIREMENT@WORK

Visit retirementatwork.org/tsus to register for access.

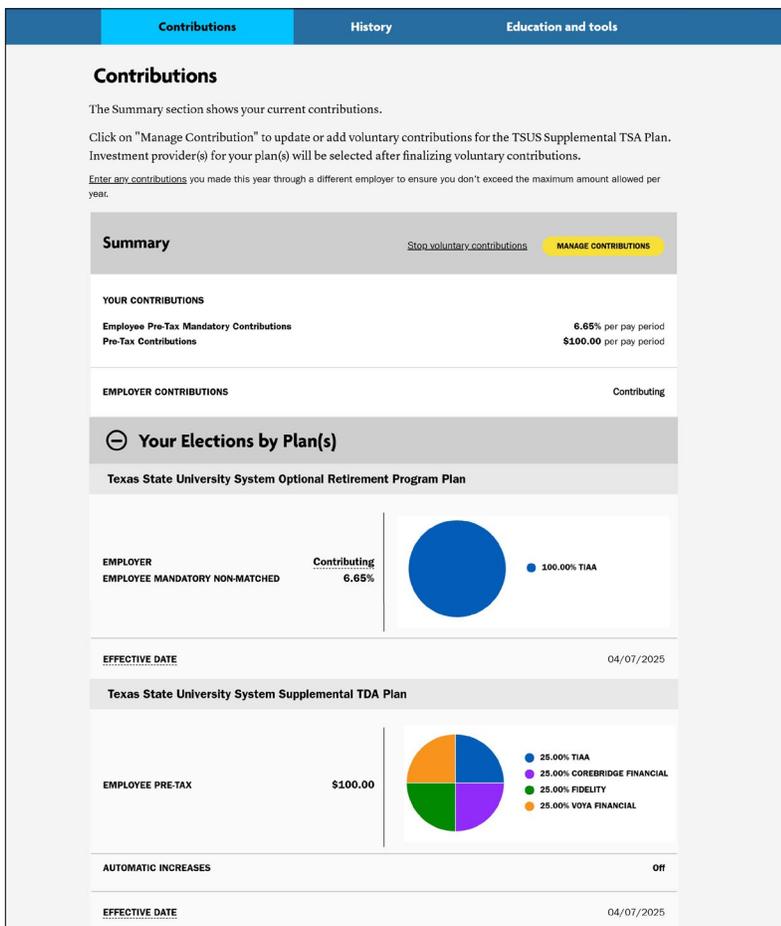
First-time users: Click *Register*.

Returning users: Click *Log In*.



2. SET UP AND MANAGE YOUR CONTRIBUTIONS

You will be taken to the *Balances* tab, where you can view your total balance in the plan, regardless of provider. To change your contributions, go to the *Contributions* tab and click *Manage Contributions*.



Click the *Education and tools* tab to read more information about the Texas State University System Retirement Plans and review available investment providers.

On the next page, enter the amount of your contribution to the plan(s) per pay period and when you want contributions to start. You have the option to make pretax contributions, Roth after-tax contributions or a combination of both.

If you enter a dollar amount, you'll see an estimate of your dollar contribution per pay period based on what you've entered.

The screenshot shows a web interface for managing contributions. At the top, there are three tabs: 'Contributions', 'History', and 'Education and tools'. Below the tabs is a header 'MANAGE CONTRIBUTIONS'. The main heading is 'When would you like to start making contributions?'. Below this heading is a sub-heading 'The date you choose will indicate the effective date of your salary deferral election(s). The selected date will be used for all SDA changes for eligible and impacted plans.' There are two radio button options: 'First available paycheck' (selected) and 'Future date'. Below these is a link for 'Payroll Schedules'. A warning box with an information icon states: 'Your plan requires you to make a contribution of 6.65% per pay period and your employer is also contributing to your retirement. Any amount you choose to contribute on this page is in addition to the required amount. Enter an amount to contribute more toward your retirement plan or continue without additional contributions.' Below this is another heading: 'How much do you want to contribute to your retirement?'. There are two radio button options: 'The maximum amount' and 'A dollar amount' (selected). Below this is a text input field for 'AMOUNT PER PAY PERIOD:' with the value '\$ 100.00' and a calculation '= 0.61%'. There is a checked checkbox for 'Allocate between Pre-Tax and/or Roth contributions'. Below this is the heading 'How would you like to split these contributions?'. There are two input fields: 'Pre-Tax' with the value '\$ 50.00' and 'Roth' with the value '\$ 50.00'. Below these is a total calculation: 'Total (must equal \$100.00): \$100.00'. At the bottom, there is a heading 'Would you like your contribution to automatically increase?' with a link 'Learn more about automatic increases'. There are two radio button options: 'Yes' and 'No'. At the very bottom, there are two buttons: 'CANCEL' and 'NEXT'.

3. SELECT INVESTMENT PROVIDERS

Choose *Yes* to direct all contributions to one investment provider.

Choose *No* to direct your contributions to multiple investment providers.

ORP: Although you will see all providers available for selection, you may only select one investment provider at 100 percent for both employer and employee mandatory non-match contributions. You can make changes to your investment provider selection at any time.

TDA: You may select one or more investment providers. The total for all providers combined must equal 100 percent.

MANAGE CONTRIBUTIONS

Who would you like to handle your retirement investments?

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

Direct all contribution types to the same investment provider(s)?
(Contribution types may vary by plan and can include various employee and employer contributions.) Choosing 'No' allows you to direct each contribution type separately.

Yes
 No

How do you want to direct your contributions?
Enter the percentage you would like to contribute to each investment provider you select.

Texas State University System Optional Retirement Program Plan

Employer

TIAA	100	%
Corebridge Financial		%
Fidelity		%
VOYA Financial		%
TOTAL (must equal 100%): 100%		

Employee Mandatory Non-Matched

TIAA	100	%
Corebridge Financial		%
Fidelity		%
VOYA Financial		%
TOTAL (must equal 100%): 100%		

Texas State University System Supplemental TDA Plan

EMPLOYEE PRE-TAX

TIAA	25	%
Corebridge Financial	25	%
Fidelity	25	%
VOYA Financial	25	%
TOTAL (must equal 100%): 100%		



You can split your TDA plan contributions between two, three or all four of the remaining providers: Corebridge Financial, Fidelity Investments®, TIAA and Voya.

4. REVIEW YOUR CONTRIBUTIONS

Check your selections.

Click *Edit* to make changes.

Review the “Terms and Conditions,” check the box, and click *Confirm*.

The next page will confirm that your elections were submitted.

MANAGE CONTRIBUTIONS

Review your contributions

Please review all contributions before you confirm your elections.

Summary EDIT

YOUR CONTRIBUTIONS

Employee Pre-Tax Mandatory Contributions	6.66% per pay period
Pre-Tax Contributions	\$400.00 per pay period

EMPLOYER CONTRIBUTIONS Contributing

Texas State University System Optional Retirement Program Plan

EMPLOYER Contributing **EMPLOYEE MANDATORY NON-MATCHED** 6.66% 100.00% TIAA

EFFECTIVE DATE First available paycheck

Texas State University System Supplemental TDA Plan

EMPLOYEE PRE-TAX \$400.00

- 25.00% COREBRIDGE FINANCIAL
- 25.00% FIDELITY
- 25.00% TIAA
- 25.00% VOYA FINANCIAL

AUTOMATIC INCREASES OFF

EFFECTIVE DATE First available paycheck

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

BACK CONFIRM

[Save & return later](#)

5. OPEN YOUR INVESTMENT ACCOUNT(S) AND SELECT INVESTMENTS

Click on the name of each provider you selected to open an account (if you do not have one already) and select your investments for your plan(s). You will exit Retirement@Work and be redirected to each provider's website to complete this task. If you selected more than one provider, **you must return to this page** to click each provider's name to complete the process.



You may be required to enter a plan number or code once on the provider's website to continue enrollment:

Corebridge Financial:

No access code required.

Fidelity Investments:

No access code required.

TIAA:

No access code required.

Voya:

Enter billing group **664099** (for the TDA) or **664100** (for the ORP), then access code **158166**.

NEED HELP? WE'VE GOT YOU COVERED.

WEBSITE SUPPORT

Call Retirement@Work at **844-567-9090**, weekdays, 7 a.m. to 9 p.m. CT.

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 in person.

COREBRIDGE FINANCIAL:

To schedule an appointment with a local financial professional, call **800-448-2542** or visit **corebridgefinancial.com/rs/tsus**. Representatives are available weekdays, 7 a.m. to 8 p.m. CT, and the Corebridge Financial automated service is available 24 hours a day, seven days a week.

FIDELITY INVESTMENTS:

To schedule an appointment with a Workplace Financial Consultant, call **800-642-7131** or visit **fidelity.com/schedule**. Representatives are available weekdays, 7:30 a.m. to 7:30 p.m. CT.

TIAA:

Schedule a session by visiting **tiaa.org/schedulenow** or calling **800-732-8353**, weekdays, 7 a.m. to 8 p.m. CT.

VOYA:

You have financial questions, we have answers. To schedule an appointment with a financial advisor or to learn more about Voya Financial's enhancements as an investment provider, visit **texasorp.beready2retire.com** or call **800-584-6001**, press **0**, and reference plan number **664099** (for the TDA) or **664100** (for the ORP).

GENERAL PLAN QUESTIONS

Texas State University Systems Office:

Call Christina Munoz at **936-294-2331**, 8 a.m. to 5 p.m. CT or email **hrbenefits@shsu.edu**.

Lamar University:

Call the HR Benefits Office at **409-880-8375**, 8 a.m. to 5 p.m. CT or email **benefits@lamar.edu**.

Sam Houston State University:

Call Christina Munoz at **936-294-2331**, 8 a.m. to 5 p.m. CT or email **hrbenefits@shsu.edu**.

Sul Ross State University:

Call Karlin DeVoll at **432-837-8058**, 8 a.m. to 5 p.m. CT or email **kdevoll@sulross.edu**.

Texas State University:

Call Leah Cuellar at **512-245-2557**, 8 a.m. to 5 p.m. CT or email **hrbenefits@txstate.edu**.

Lamar Institute of Technology:

Call Human Resources at **409-981-6824**, 8 a.m. to 5 p.m. CT or email **HR@lit.edu**.

Lamar State College Orange:

Call Human Resources at **409-882-3905**, 8 a.m. to 5 p.m. CT or email **HumanResources@lsco.edu**.

Lamar State College Port Arthur:

Call Human Resources at **409-984-6259**, 8 a.m. to 5 p.m. CT or email **HumanResources@lamarpa.edu**.

The Texas State University System (TSUS) includes the following institutions: Lamar University, Sam Houston State University, Sul Ross State University, Texas State University, Lamar Institute of Technology, Lamar State College Orange and Lamar State College Port Arthur.