HOW TO CHECK OR CHANGE YOUR TIAA CONTRIBUTIONS

To change your TIAA contributions, log into your TIAA account. *If you need help with this, please contact TIAA directly at 800-842-2733.*

🗗 TIAA	Accounts ~ Plan & Lear	rn ~ Statements & Do	cuments ~	Q Search	🕂 Alerts	e Profile	Log o
	Your accounts Retirement	•	Quick links Manage contributions View investments Research investments Change retirement investments Loans & withdrawals	Start a rollover View all products 🛃 Open an account View all actions	Jate in s you	⊖ T0 ∨	
* .	← Account Home ToTAL BALANCE: ALL ACCOUNTS \$33,457.14 As of dates very	RETIREMENT BALANCE \$31,122.34 As of 08/27/2024	RETIREMENT PERSONAL RATE OF RETURN +3.66% 01/01/2024 - 05/31/2024	year to date rethrement contribu \$2,695.71 View details	TIONS		

At the top under "Accounts" and elect Manage Contributions

Click on Manage Contributions again.

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	Managa Cantuibutiana		
	Manage Contributions		
	Employer-Sponsored Retirement Plans		
	SOUTHWESTERN UNIVERSITY REGULAR RETIREMENT PLAN FOR	Manager and Manager A	
	ALL EMPLOTEE	Manage contributions 2	
	Flan Number: 103470		

This brings you to a summary page. Again, click on Manage Contributions:

Contributions	
The Automatic Enrollment is a feature that helps you save more fo Southwestern University.	r retirement. The decision to participate will not affect the contribution you receive from
Enter any contributions you made this year through a diffe year.	rent employer to ensure you don't exceed the maximum amount allowed per
(i) Check out <u>Advice & Guidance</u> for useful resources and edu	cational articles from retirement basics to living retirement.
(i) View your payroll calendar: <u>Payroll Schedules</u> <u>PDF</u>	
Summary	Stop voluntary contributions MANAGE CONTRIBUTIONS
YOUR CONTRIBUTIONS	2% per pay period

You have the option of selecting "First Available Paycheck" or "Future Date". Depending on where we are in the payroll cycle, the first available might be the following month. (Check the link for Payroll Schedules to confirm.)



You will see what percentage you currently have, and whether it is pre-tax or ROTH (after tax):

How much do you want to contribute to your 403(b) plan?





How would you like to split these contributions?



Next, elect what percentage you want to contribute. NOTE – You can ONLY elect a percentage, not a flat amount. However, the program will tell you what the percentage amount should be, so if you are looking for an actual amount you can adjust the percentage to get as close as you can.

It is IMPORTANT to note that if you change the percentage, it will AUTOMATICALLY allocate it to Pre-Tax, so if you want to split the amount or have it be all ROTH, you must MANUALLY make that distinction.

How much do you want to contribute to your 403(b) plan?	How much do you want to contribute to your 403(b) plan?		
A percentage	A percentage		
AMOUNT PER PAY PERIOD:	AMOUNT PER PAY PERIOD:		
Allocate between Pre-Tax and/or Roth contributions	 Allocate between Pre-Tax and/or Roth contributions How would you like to split these contributions? 		
	Pre-Tax 2 %		
Pre-Tax 4 %	Roth 2 %		
Roth 0 %	TOTAL (must equal 4%): 4%		

Click **NEXT** at the bottom:

CANCEL	
For individual customers	Regulation Best Interest

You will then be asked to review your contributions.

MAKE SURE everything is as you want it to be. Then check "I have read and accept these Terms and Conditions" and click CONFIRM.

Review your contributions Please review all contributions before you confirm your elections.			
Summary	EDIT		
YOUR CONTRIBUTIONS	4% per pay period		
EMPLOYER CONTRIBUTIONS	Contributing		
Southwestern University Regular Retirement Plan for All Employees			
EMPLOYEE PRE-TAX	2%		
ROTH	2%		
EMPLOYER	Contributing		
EFFECTIVE DATE	First available paycheck		
I have read and accept these <u>Terms & conditions</u>			
PREVIOUS CONFIRM			
<u>Come back later</u>			

If you want to make sure that everything was accepted, you can log back in at any time.

IMPORTANT THINGS TO REMEMBER –

- If you are too close to the payroll cutoff date, your election may not go in until the following month.
- If you change the percentage, it will default to that full percentage in the Pre-Tax category.
- MAKE SURE it is allocated to Pre-Tax or ROTH as you want.

If you have questions or problems, contact TIAA directly at 800-842-2733

Take advantage of TIAA's free workshops and one-on-one counseling sessions. Watch <u>Campus Notices</u> for updates.