### RETIREMENT @work®

# Quick Start Guide

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

## Welcome to Retirement@Work®, where you can:

- Track your progress: Get a snapshot of all your investments, and view current and past transactions.
- Make informed decisions: Learn more about your retirement plan(s), and use calculators and other tools to help plan for the type of retirement you want.
- Take action: Change your contribution amount or how it's split among your selected investment provider(s).



## 1. Access Retirement@Work

Visit **The University of Akron Human Resources** webpage and log in using your existing login to gain access to Retirement@Work.

## 2. Set up and manage your contributions

First-time users: Click Set Up Contributions.



Click the + next to each plan to read more information and review available investment providers.

**Returning users:** 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*.

The. niversity sron					$\bigcirc$	6	AS	I	
	BALANCES	CONTRIBUTION	IS HISTORY	ED	UCATION &	TOOLS			
В	alances								
	total bilance" for all fland at: University of Akron ex ef 04/30/2022**			\$100,000.00					
	Balance Info	ormation	PLAN BA	LANCES					
s	5105K 100K \$95K				<ul> <li>70.00% Th AKRON AL RETIREME</li> <li>30.00% Th AKRON 40 ANNUTY F</li> </ul>	IE UNIVERSITY O TERNATIVE INT PLAN IE UNIVERSITY O I3(B) TAX SHELTE PROGRAM	F F RED		
	02 2020	03 2020	Q4 2020						
	$\oplus$ The Univers	ity of Akron Alter	native Retireme	nt Plan	\$70, Balance	000.00*	*		
	⊕ The University of Akron 403(b) Tax Sheltered Annuity Program				\$30, Balance	000.00*	*		
	Total balance*= \$100,000.00								
= Yo T infor	ur total balance may or may not in The balances and/or accrued bene mation.	clude outstanding or default loan amo fit amounts were captured when we la	unts. Please check with your provid st received data from your plan pro	er(s) for more details. rider. Please consult y	our plan provider for t	the most recent avai	lable		

Contributions								
If you have not opened an account with an investment provider, please select the following provider's link to enroll: <u>TIAA</u> , <u>AIG Retirement</u> <u>Services</u> , <u>Enuitable</u>								
Welcome to the University of Akron Online Salary Deferral and Enrollment site.								
Enter any contributions you made this year through a different employer to ensure you don't exceed the maximum amount allowed per year.								
Summary	Stop voluntary contributions M	IANAGE CONTRIBUTIONS						

On the next page, enter the amount you want to contribute to the voluntary plan(s) per pay period and when you want contributions to start.

Click the indicated button to split your contributions between pretax and Roth.

- If you enter a percentage, you'll see an estimate of your dollar contribution per pay period.
- If you enter a dollar amount, you'll see an estimate of your percentage contribution per pay period.

## 3. Select investment providers

Decide if you want to direct all of your contributions to the same investment provider(s) and click Yes or No.

If you choose Yes, all plans in which you contribute and all contribution types—which, based on your plan(s), may include employee contributions, pretax, and Roth—will be directed to the same investment provider(s) in the same percentages.

If you choose No, you will then make your choices by individual plan and contribution type.

Enter the percentage you wish to allocate to each provider. Ensure your total equals 100 percent.

of Akron						S	0	AB	LOG OUT		
	CONTRIBUTIO	N5	HISTORY	ED	UCATIO	N & TOO	DLS				
MANAGE CONTRIBUTIONS											
Who would you like to handle your retirement investments?											
select the investment providers you were investigated on any provider to the set of the											
Direct all contribution types to the same investment provider(s)?											
	(Contribution types may vary by p	each can include vari each c	ous employee and emp ontribution type separa	ately.	.) Choosing	No. allow	vs you to d	irect			
			Yes								
			⊖ No								
		How do you wan	t to direct your	contribution	ns?						
	Enter the	percentage you would lik	e to contribute to each	i investment provid	er you sele	ct.					
		TIAA	25	%							
		AIG Retirement Services	25	%							
		Equitable	25	%							
		VOYA Financial	25	%							
	TOTAL (must equal 100%): <b>100%</b>										
		BACK		EXT							

## 4. Review your contributions

Check to be sure your desired selections are reflected in the summary.

If they are not, click the *Edit* button to make changes.

Once your selections are shown, review the "Terms and Conditions," check the box, then click *Confirm*. The next page will confirm that your elections were submitted.

# 5. Open your investment account(s) and select investments

Click the name of each provider you selected to open an account with them (if you do not have one already) and select your investments by plan. You will exit Retirement@Work and be taken 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.

of Akron				S	AB	LOG OUT			
	CONTRIBUTIONS	HISTORY	EDUCATIO	N & TOOL	.5				
		MANAGE CONTRIBUTIONS	i.						
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 pu Click the buttons below to do so.     TIA AIG	count and customize your investmer	nt strategy. OYA FINANCIA	AL )					
	If you choose not to proceed to each provide default beneficiary selection.	r's webpage to open your account, y	ou will be placed in the Plan's defa	ult investment	option and				

-`Ų

You will be required to enter a plan number once on your selected provider's site to continue enrollment:

#### AIG

ARP: 17016001 403(b): 17016002 403(b) Roth Only: 17016202 457(b): 17016003 457(b) Roth Only: 17016303

**Equitable:** Contact Equitable

TIAA: Not required

Voya ARP: 664642 403(b): 664641 457(b): 664643 Verification Code: 069963

## Need help? We've got you covered.

### 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 in person.

- TIAA: 800-842-2252
- AIG: 800-448-2542 or James Musengo, CFP: 330-221-1899
- Equitable: equitable.com
- Voya: 216-447-3765

### **General plan questions**

Contact the Office of Human Resources by email at benefits@uakron.edu.

#### Learn more

Visit The University of Akron Human Resources webpage.

This short video provides a step-by-step visual guide to using Retirement@Work. Watch the video here.

