RETIREMENT@work®

Quick Start Guide

Everything for your Wesleyan University Retirement Plan.
In one location.

Welcome to Retirement@Work®, where you can:

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

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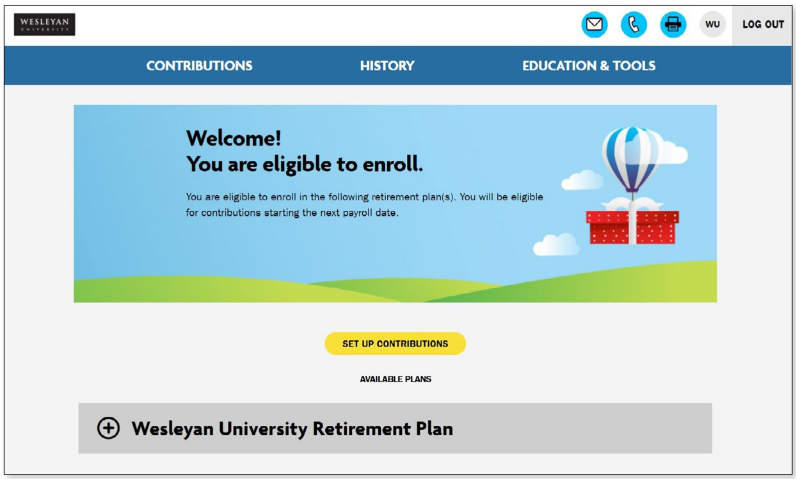
1. Access Retirement@Work

Click **WesPortal**, select *My Information* and then select *Retirement@Work*, to gain access to Retirement@Work. If prompted, log in or register for access.

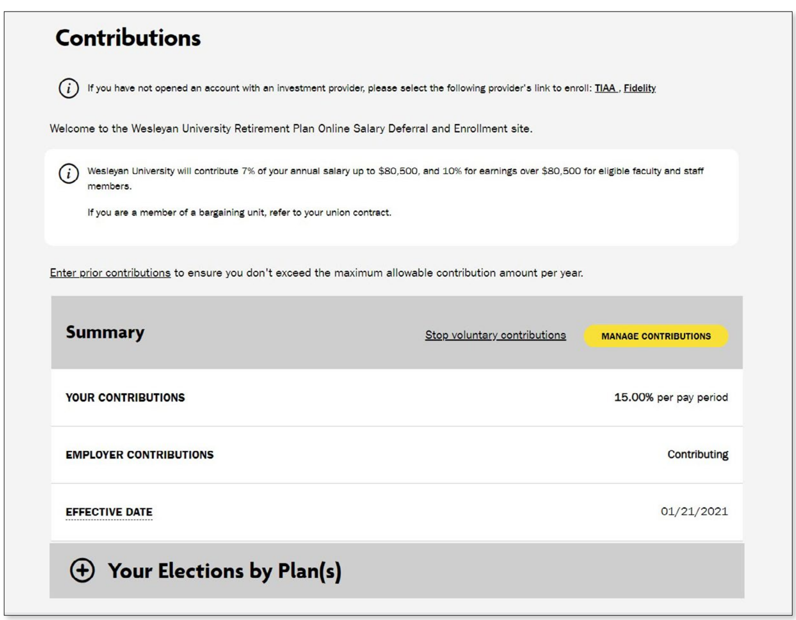
2. Set up and manage your contributions

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, regardless of provider, in the Plan. To change your contributions, go to the *Contributions* tab and click *Manage 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.

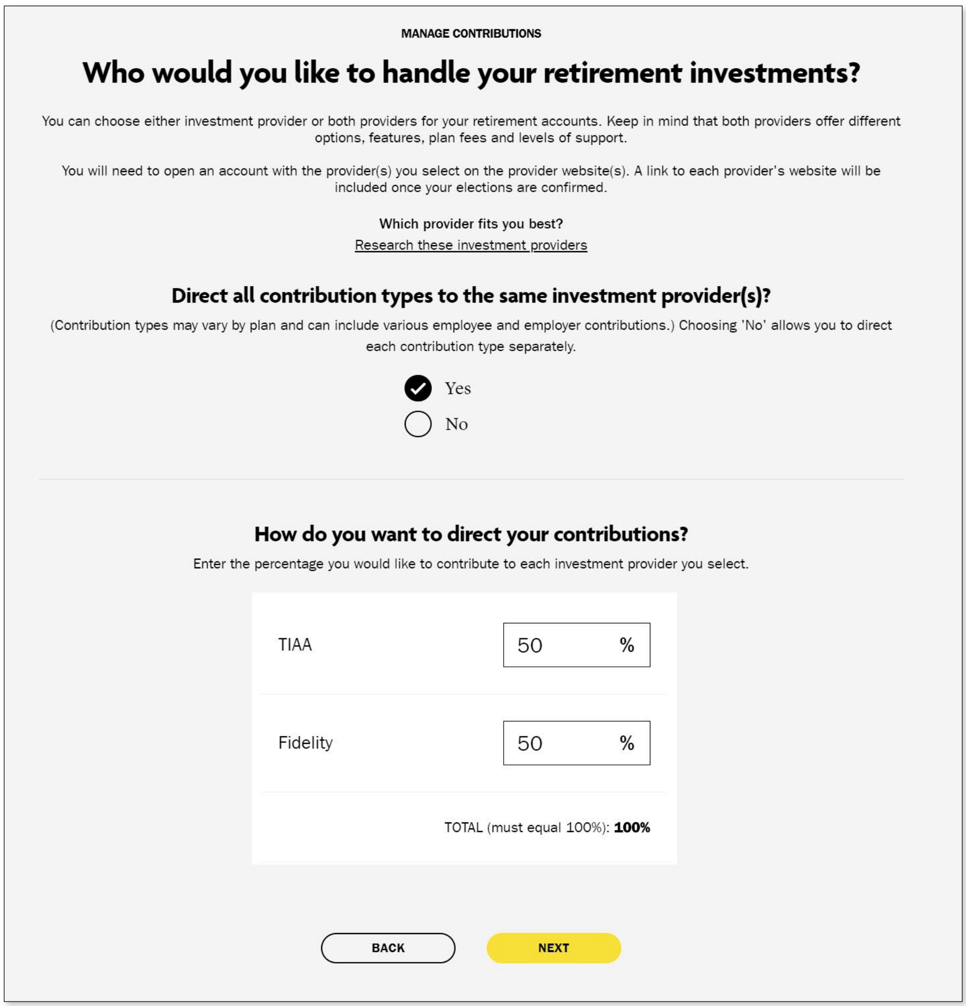
- Based on the percentage you enter, you'll see an estimate of your dollar contribution per pay period.

3. Select investment provider(s)

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 employer contributions, 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.



If you need help with selecting your investments or developing your savings strategy, you may contact:

TIAA
Call **800-732-8353**, weekdays, 8 a.m. to 10 p.m. (ET).

You can also schedule an advice session online at **TIAA.org/schedulenow**.

Fidelity
Call **800-642-7131**, weekdays, 8 a.m. to midnight (ET).

If you would like to schedule a confidential consultation, visit **Fidelity.com/schedule**.

4. Review your contributions

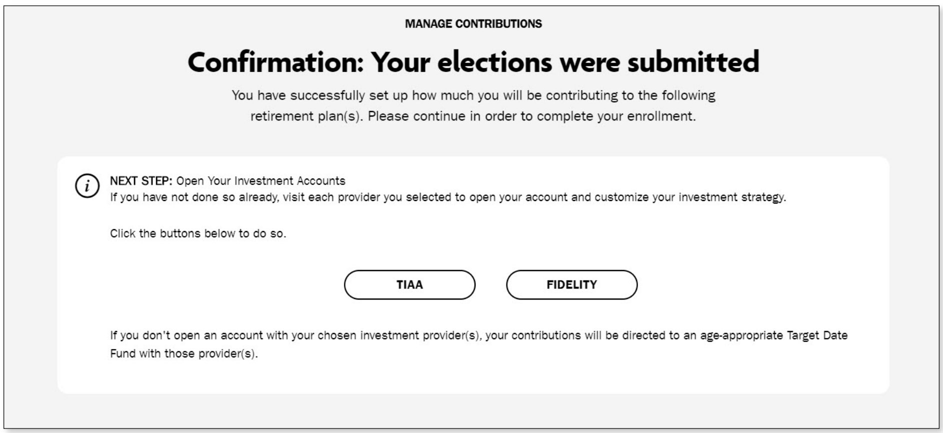
Check to be sure your desired selections are reflected in the summary.

If they are not, click *Edit* 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.



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 virtually.

- TIAA: **800-732-8353**
- Fidelity: **800-642-7131**

General plan questions

Call the Human Resources Department at **860-685-2100**, 9 a.m. to 4:30 p.m. (ET) or email **benefits@wesleyan.edu**.

Learn more

Visit **wesleyan.edu/hr/careers/benefits.html**.

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

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