Tax-Deferred Savings Plan: How to Enroll

BE READY WITH YOUR:

- Investment choices and allocations
  Go to www.tiaa-cref.org/public/tcm/wmich to review your investment choices.
- Online enrollment access codes
  403(b) Retirement Plan (Employer paid contributions): 101807
  403(b) Tax-Deferred Annuity Plan: 101808
  457(b) Deferred Compensation Plan: 101809
- Social Security Number
- Date of Birth
- Beneficiary’s Social Security Number, birth date and address

If you need assistance with enrolling online, call the TIAA Enrollment Center at 1-800-842-2888, Monday through Friday, from 8 a.m. to 10 p.m., and Saturday from 9 a.m. to 6 p.m. (ET). A TIAA representative will guide you through the online enrollment process.

TO ENROLL ONLINE:

First time accessing your account?

- GO TO www.tiaa-cref.org/public/tcm/wmich AND CLICK “ENROLL NOW”.
- Under “ENROLL ONLINE”, click the links for the plan you wish to enroll in.
- A new window will be generated. Click "Register with TIAA-CREF" and follow the prompts.

Already have a User ID and Password?

- LOG IN TO www.tiaa-cref.org/wmich AND CLICK “ENROLL NOW”
- Enter your access code and follow the on-screen directions to complete your enrollment application, clicking “next” in the lower-right corner to advance each screen.

NOTE: At the allocations screen, you can click on any investment choice to view its fact sheet. Once you complete your enrollment, you can retrieve and print a confirmation page from the “Congratulations” screen.

IMPORTANT:

If you participate in the Western Michigan University 403(b) Tax-Deferred Savings Plan or the Western Michigan University 457(b) Deferred Compensation Plan, you must complete and submit a Salary Reduction Agreement (SRA) form for your enrollment application to be processed.

Access the SRA form at wmich.edu/hr/forms/retirement. Complete, print, sign, and submit it to Human Resources.

Go to enrollonline.fidelity.com to complete the Fidelity Investments Online Enrollment process. Enter Plan ID Number [403(b) Plan: 55686 or 457(b) Plan: 08264] and your Social Security Number then complete the following steps on the Fidelity site:

- Personal Information
- Custodial Agreement
- Transfer of Assets
- Review & Submit
- Summary & Next Steps

To enter investment allocations, you must complete the enrollment process within Fidelity NetBenefits and follow the prompts to create a PIN.

After establishing your PIN, return to NetBenefits and log in. Click the Enroll Now link to complete your enrollment.

For more information, visit www.fidelity.com/atwork or call 1-800-248-4213 for enrollment information Monday through Friday, from 8 a.m. to 8 p.m.