

Introducing a new retirement plan

Aidan Montessori School (Aidan) is introducing a new retirement plan with updated investment options and services to help you pursue your retirement goals.

The updates will start May 14, 2025.



The what, when and how of the retirement plan updates.

Features of the new plan

The features are designed to help you plan and save for retirement.



AIMS/AISGW MEP

Aidan has chosen to participate in the Association of Independent Maryland and DC Schools and Association of Independent Schools of Greater Washington Multiple Employer Plan (AIMS/AISGW MEP) to manage its retirement plans more efficiently and help lower costs for participants.



New plan

If you are actively contributing to the plans, you will be enrolled in a new retirement plan—the AIMS/AISGW MEP 403(b) Plan – Aidan Montessori School.¹



AIMS/AISGW Retirement Income Portfolios

This new service automatically manages your investments, making it easier for you to stay on track with your retirement goals. It will also serve as the new plan's default investment option.

You will be subscribed to this service until you elect a different option.



Make sure to review the enclosed guide and notices for important dates and information about the plan updates. You can make changes to your account and investment choices at any time.

No longer employed by Aidan?

Although you aren't actively contributing to the retirement plans, please review the enclosed information to understand what's happening and how the changes may affect your account(s).

¹ Includes any employee or employer contributions in the last 90 days.

Mark your calendar

APR. 30, 2025

Final contributions to the existing plans and allocations on file.

MAY 14, 2025

If you are actively contributing to the plans, you'll be automatically enrolled in the new retirement plan, and future contributions will be directed to the AIMS/AISGW Retirement Income Portfolios. You can make changes to your account at any time.

MAY 15, 2025

The new retirement plan receives the first payroll contributions.

Roth option

You can continue to make contributions with after-tax dollars as part of the new plan. These contributions and any earnings will be tax free at withdrawal if certain conditions are met.



Consider your next steps

While no action is required, it's important to play an active role in planning for your retirement.¹

- Review the new investment lineup and read the enclosed information carefully to see how the changes may affect you.
- Starting May 14, 2025, you may access your account to make updates if you choose.
- Meet with a OneDigital advisor or TIAA financial consultant to discuss your personal situation and possible options.

Schedule an investment advice session.

This service is available *at no additional cost to you, and no minimum balance is required.*

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TIAA

Visit tiaa.org/schedulenow, or call **800-732-8353**, weekdays, 8 a.m. to 8 p.m. ET.

Manage your account.

ONLINE

Visit tiaa.org/aims-aisgw and log in to your account. If you're new to TIAA, select *Log in*, then *Need online access?* Follow the directions to access your account.

PHONE

Call TIAA at **800-842-2252**, weekdays, 8 a.m. to 10 p.m. ET.



¹ If you currently receive retirement plan distributions, have automatic account rebalancing and/or have loans, you may be required to take action. Please review the enclosed guide.