



Retirement program updates

Catholic University is enhancing the retirement plans it offers with new accounts to help you pursue your retirement goals.

The enhancements will start Jan. 31, 2025.



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

Updates to your plans

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



New account(s)

As a plan participant, you will be enrolled in new types of plan accounts with TIAA.



Increased fee transparency

A new fee structure will make it easier to view the cost of each investment option as well as fees paid for plan administration.



Retirement plan investment advice

You can continue to receive advice on the investment options from a TIAA financial consultant.



Make sure to review the enclosed guide 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 Catholic University?

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 balance.

Mark your calendar

JAN. 31, 2025

Enrollment in a new plan account with TIAA is expected to occur. You will receive an enrollment confirmation.

WEEK OF FEB. 3, 2025

Your existing mutual fund balances will be transferred to the same investments in your new account(s).

FEB. 7, 2025

New account(s) receives the first payroll contribution.



Consider your next steps

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

- Read the enclosed information carefully to see how the changes may affect you.
- Access your account to make any updates to your beneficiary designation(s).
- Review the investment lineup and your investment choices. Make any changes needed.

Schedule an investment advice session.

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

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/catholic 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.

THE CATHOLIC
UNIVERSITY
OF AMERICA



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.