Making Changes to the SUNY Voluntary 403(b) Savings Plan

Making retirement account changes with Retirement@Work

Retirement@Work is the online enrollment and management system for the State University of New York Retirement Plan. You can return to Retirement@Work anytime to:

- Change your investment providers for your Optional Retirement Program (ORP) and Voluntary 403(b) Savings Plan (VSP) accounts.
- Manage (start, stop, restart, increase or decrease) your 403(b) salary deferral elections online.
  - If you are starting new contributions, click on the Set up contributions button.
- Enroll in the pre-tax (Traditional) and/or after-tax (Roth) option.
- View your VSP account balance.
- Make informed decisions with consolidated views of your current and historical account information—including account balances, contributions and distributions across all providers.

Employees may only view and manage their ORP and 403(b) accounts with Retirement@Work. The Defined Benefit Plan—NYS Retirement Plans (TRS or ERS), New York Police and Fire Retirement System (PFRS) as well as the NYS Deferred Compensation Plan—are not administered by Retirement@Work. For additional information on these benefit programs and individual advisors available for your campus, please refer to suny.edu/retirement.

Make changes

1. Visit retirementatwork.org/suny
   Click Already registered and log in with your credentials.

2. Open and manage your retirement plan
   Click on My retirement under Make Changes.

3. Location
   Select your location by clicking Continue.

4. Contributions
   On the Contributions tab, if you are starting new contributions, click on the Set up contributions button. If you are changing your contributions, click on the Manage contributions button. If you need to stop contributions, click on the Stop voluntary contributions link. Check the box to accept the terms and conditions, then click on the Stop contributions button.

5. Let’s set up your retirement contributions*
   Change your amount per pay period to the desired amount. Check the box if you wish to allocate between pre-tax (Traditional) and/or after-tax (Roth). Select the effective date and click Next.

6. Who would you like to handle your retirement investments?
   If needed, update the amount of your pre-tax (Traditional) and/or after-tax (Roth) contributions that you wish to allocate to each investment provider. Click Next.

7. Review your contributions
   Review the terms and conditions of the Salary Deferral Agreement, and check the box to accept. Click Confirm.

*If you elect to contribute a flat dollar amount that exceeds the amount available in your net pay, a partial deduction will be made equal to the amount of net pay available. This will result in a $0 net paycheck.

Need help? Call the Customer Service Center at 866-271-0960.
8. **Confirmation: Your elections were submitted**

You will now be prompted to visit each website of the investment provider(s) you selected to open an account (if you do not have one already) and select your investments.

Please note: 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 and click each provider’s name to complete the process.

If you have questions about investment options and services, contact the investment provider(s) directly:

<table>
<thead>
<tr>
<th>Provider</th>
<th>Website</th>
<th>Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corebridge Financial (formerly AIG Retirement</td>
<td><a href="http://corebridgefinancial.com/rs/suny">corebridgefinancial.com/rs/suny</a></td>
<td>Richard Grofsick, Advisor</td>
</tr>
<tr>
<td>Services)</td>
<td></td>
<td>518-783-6464</td>
</tr>
<tr>
<td>Fidelity</td>
<td><a href="http://netbenefits.com/SUNY">netbenefits.com/SUNY</a></td>
<td>800-343-0860</td>
</tr>
<tr>
<td>TIAA</td>
<td><a href="http://TIAA.org/suny">TIAA.org/suny</a></td>
<td>866-662-7945</td>
</tr>
<tr>
<td>Voya</td>
<td><a href="http://suny.beready2retire.com">suny.beready2retire.com</a></td>
<td>800-584-6001</td>
</tr>
</tbody>
</table>

**Need help?**

If you need assistance with the Retirement@Work system, call **866-271-0960**, weekdays, 8 a.m. to 10 p.m. (ET). You will be connected with one of our experienced Retirement@Work consultants.

If you have questions regarding SUNY retirement benefits, please contact your campus benefits administrator.

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*Employees of Roswell Park Cancer Institute, the New York State Education Department (NYSED), the SUNY Contract Colleges@Cornell, or the NYS VDC Program are not eligible to participate in the SUNY Voluntary 403(b) Savings Plan.*

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