University of Central Florida 403(b) Plan

Retirement@Work®

University of Central Florida simplified online portal to help you manage your University of Central Florida 403(b) Plan

Retirement@Work® makes it easier for you to:

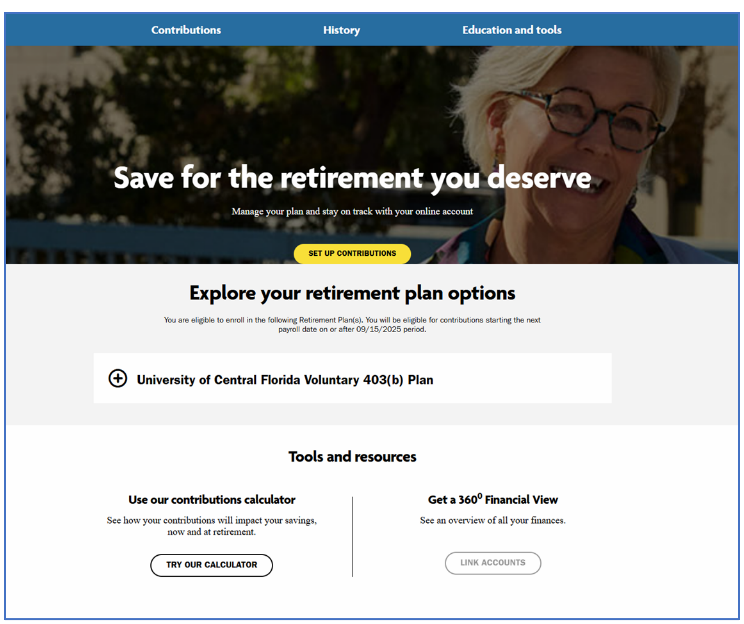
- Change your contribution amount-Start, stop or change your contributions with a few simple clicks; no paper Forms required.
- Choose your investment provider(s)- University of Central Florida has three approved providers who offer investment options: Corebridge Financial, Fidelity and TIAA. Contribute to one or more of the providers and get consolidated account information on the site.

Accessing your **Retirement@Work®account is easy.**

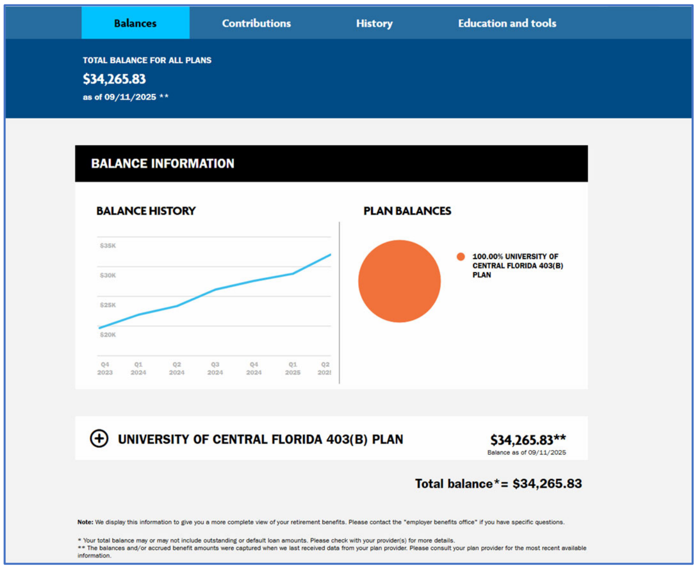
As a UCF employee, you are eligible to participate in the University of Central Florida 403(b) Plan. To access your Retirement@Work® account, visit the UCF human resource website Retirement page and click Retirement@Work®**.** If prompted, log in using your MyUCF NID and password. You will be redirected to the Retirement@Work® site.

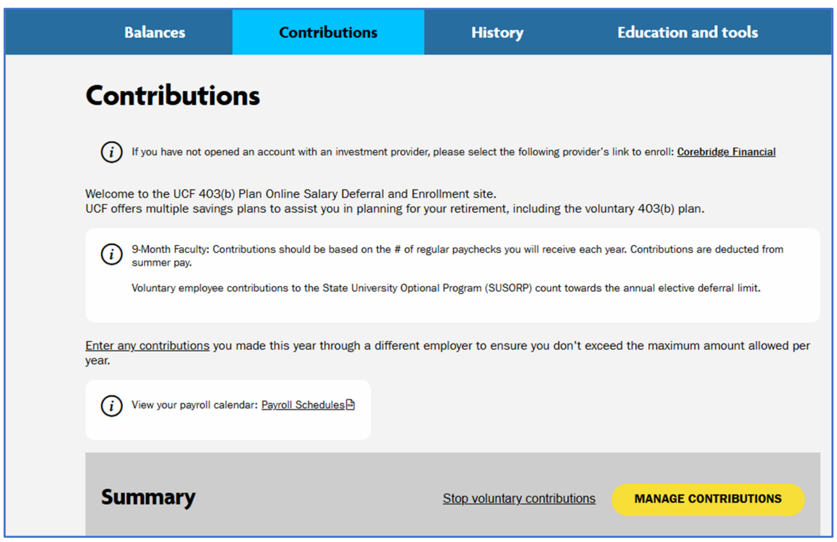
Set up and manage your contributions

First time users: Click *Set Up Contributions*



Returning users: You will be taken to the *Balances* tab where you can view your total balance in the Plan, regardless of provider: To change contributions , go to the *Contributions* tab and click *Manage Contributions.*

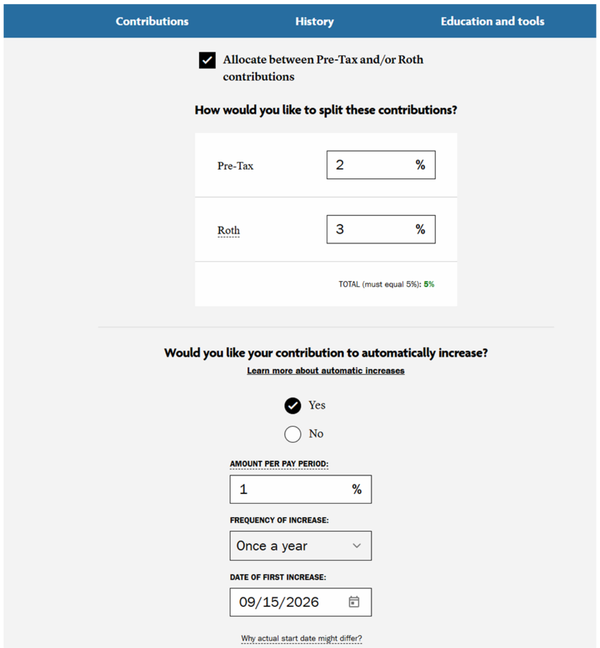




On the next page, enter the amount you want to contribute to the voluntary plan(s) per pay period and when you want your contributions to start.

Click the indicated button to split your contributions between Pre-tax and Roth.

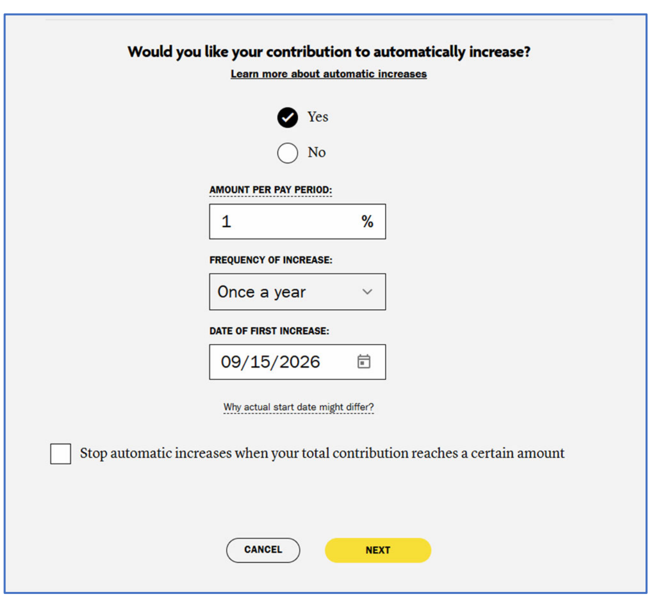
- If you enter a percentage, you'll see an estimate of your dollar amount contribution per pay period
- If you enter a dollar amount you will see an estimate of your percentage contribution per pay period



Important! Please be sure to check the box to allocate between Pre-tax and Roth Contributions. You will also want to ensure that your contributions are split as you desire.

Annual Increase Program

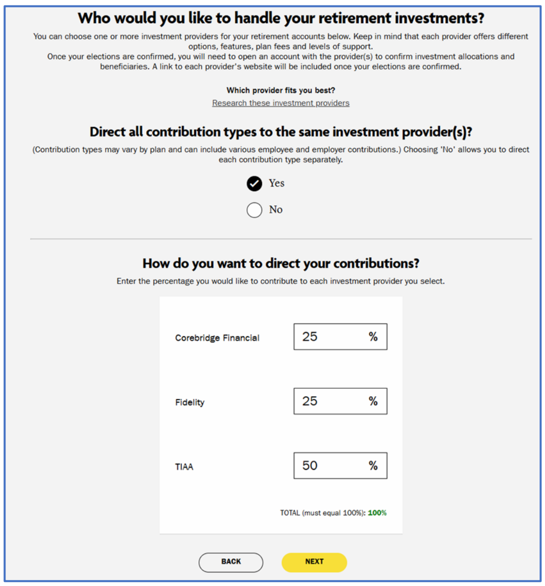
At the bottom of the page you can select if you would like your contributions to automatically increase. If so, click *Yes.* Select the *Frequency of the increase* and select the *date of the first increase*



Select investment providers

Decide if you want to direct all of your contributions to the same investment provider(s) and click *Yes* or *No*.

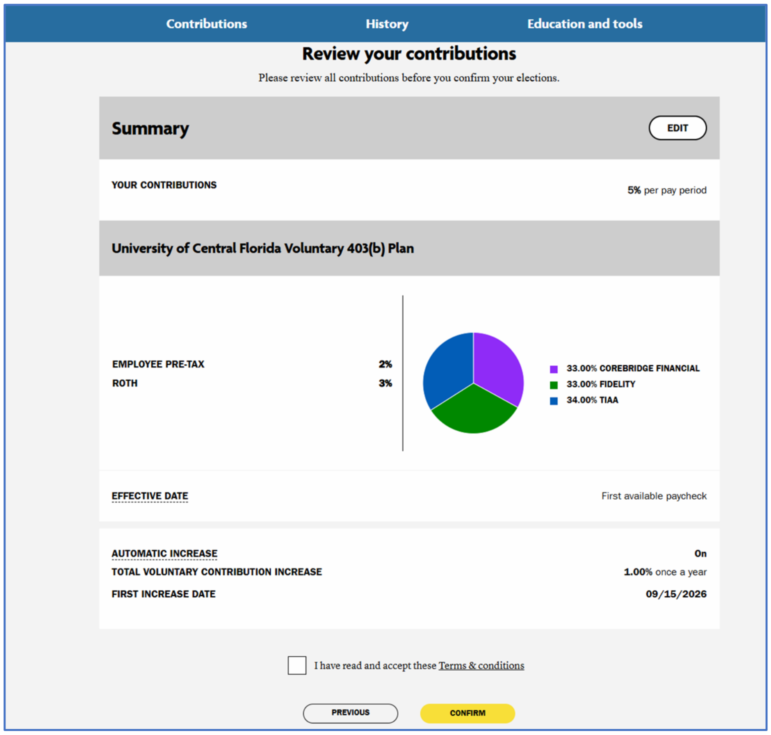
If you choose YES, all the plans in which you contribute and all contribution types- which, based on your plan(s) may include employer contributions, employee contributions, Pre-tax, and Roth—will be directed to the same investment provider(s) in the same percentages. If you choose No, you will then 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



Voluntary State University System Optional Retirement Program (SUSORP) contributions count toward the annual 403(b) maximum contribution limit. For information regarding the annual contribution limit, refer to the Voluntary retirement Plan page of the UCF Benefits Guide

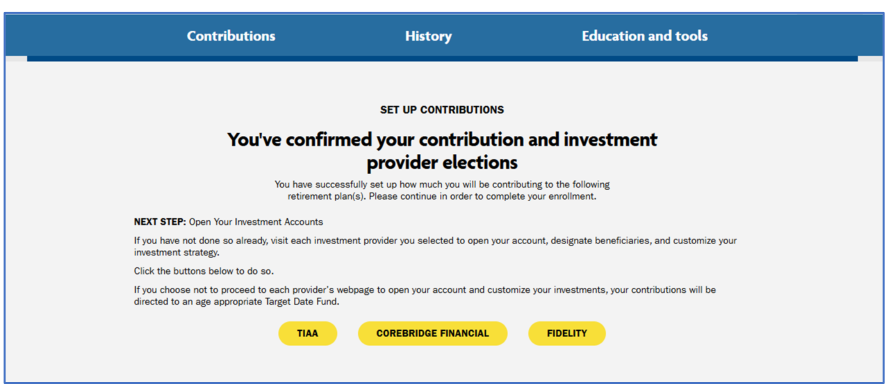
Review your contributions

Check to be sure your desired selections are reflected in the summary. If they are not, click the *Edit* button 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.



Open your investment account(s) and select investments

Click the name of each provider you selected to open an account with them 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.



You will be required to enter a plan number once on your selected provider’s site to continue enrollment.
Corebridge Financial:
07697001 (Pre-tax)
07697101 (Roth)
Fidelity:56713
TIAA: Not needed

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) or from CAPTRUST, an independent investment advisory firm hired by UCF:

- Corebridge Financial: **800-448-2542**
- CAPTRUST: **800-967-9948** or **CAPTRUST**
- Fidelity: **800-343-0860** or **Fidelity**
- TIAA: **800-842-2252** or **TIAA**

General plan questions

Call the UCF HR Office at **407-823-2771**, weekdays 8 a.m. to 5 p.m. (ET) or email **benefits@ucf.edu**.

Learn more

Visit website: **https://hr.ucf.edu/current-employees/retirement/**

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