

How to Update Your Deferral

GEORGE WASHINGTON UNIVERSITY 403(B) RETIREMENT PLAN

Fidelity Investments
(800) 343-0860

TIAA
(800) 842-2776

THE GEORGE
WASHINGTON
UNIVERSITY
WASHINGTON, DC

Fidelity Investments supports the GW enrollment process and provides ongoing account services, whether you choose Fidelity Investments or TIAA as your investment provider.

1. To update your salary deferral election, please visit Fidelity NetBenefits at www.NetBenefits.com/GW, or call a Fidelity retirement plan representative at **(800) 343-0860**. Fidelity Investments is GW's primary administrative service provider. You will be able to use the Fidelity NetBenefits site to change your deferrals whether your investments are with Fidelity or TIAA.
2. **If calling the hotline:** You will be asked for identifying information. Once you are verified, simply ask the representative to assist you with updating your deferral election.
3. **If using the website:** Once you are logged in, you will see all of your plans listed. Find the plan, **GW 403B-Fidelity**, and go to the adjacent Quick Links drop-down box. Select **Contribution Amount**.
4. On the Contribution Amount screen, you can change your contribution amount and/or your investment providers. To change your deferral election, select **Contribution Amount**.
5. On the Contribution Amount per Pay Period screen, enter your new pre-tax 403(b) contributions or post-tax Roth 403(b) contributions (or a combination of the two), and then select **Change Contribution Amount**. The next screen will show your new election. If correct, click **Submit** to confirm the new amount. This will bring you to a screen with a confirmation number for your records.
6. To review your investment provider(s), select **Return to Contribution Amount** from the bottom of the confirmation page. Then, select **Retirement Providers**.
7. On the Retirement Providers screen, review the percentages of your contribution that are directed to each vendor. Make any changes that are desired, and then select **Change Retirement Provider Elections**. The next screen will show your new election. If correct, click **Submit** to confirm the new directions. This will bring you to a screen with a confirmation number for your records.

Please note: If you choose TIAA as an investment provider, you will need to contact TIAA directly at **(800) 842-2776**, or log in to their website at www.tiaa.org/gwu, to make any changes to the funds that your contributions are deposited into.

8. Update beneficiaries online on your vendor's web site, or visit www.benefits.gwu.edu/benefits-forms to download the appropriate paper form(s).

If enrolled in both the 403(b) and the 401(a) retirement plans, please review the retirement providers for all plans to ensure that your funds are directed to your preferred vendor. Investment and beneficiary elections are separate for each vendor and plan.

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New enrollees should note that any contributions made to a previous employer's plan in this calendar year count toward the annual IRS limits. Employees are responsible for their personal tax situation and for the impact of their contributions, including consequences of exceeding annual limits.