



Santa Clara
UNIVERSITY

Retirement Plan Portal User Guide



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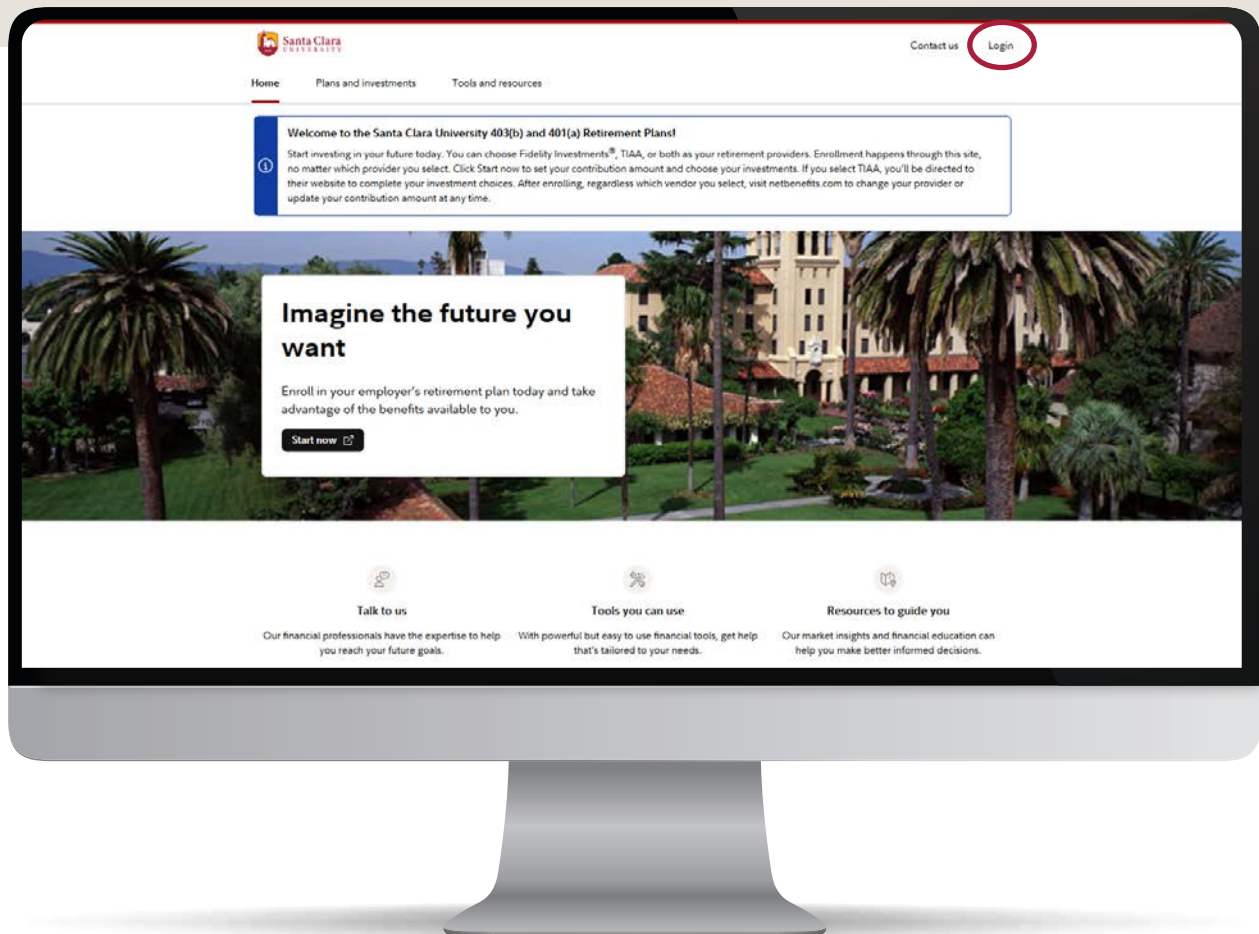


How to Access and Manage Your Santa Clara University (SCU) Retirement Plan Accounts with Fidelity or TIAA Online

Your SCU Retirement Plans are important benefits, so you need the right information, resources, and support to help you make decisions with confidence.

You can visit the website at www.netbenefits.com/scu to view Plan details, access tools and calculators, and log on to your NetBenefits® account to make updates. You can also call the Fidelity Retirement Service Center at **800-343-0860**.

All active and eligible employees and plan participants may log on to NetBenefits at any time. NetBenefits is where you will enroll, make retirement provider elections, and make changes to your deferral election.





Click one of the buttons below based on what you want to do today. If you are reviewing a printed copy of this guide, turn to the page indicated.



Log On

to Your NetBenefits Account

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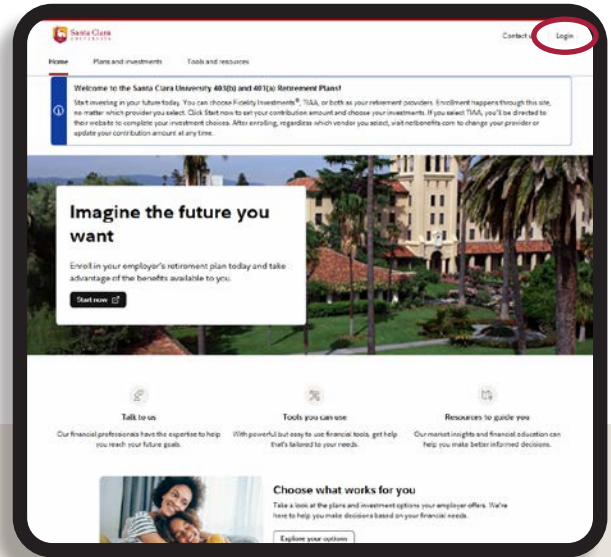
Representatives are Here to Help

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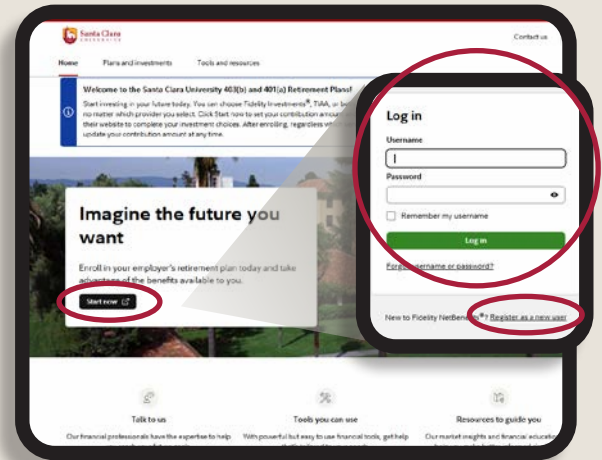
Hover over screenshots to enlarge

- Log on to your NetBenefits account at www.netbenefits.com/scu.
- If you are a current Fidelity customer or already have a NetBenefits username and password, you can continue to use them to log on to your NetBenefits account.
- At the top right of the home page, select the **Login** button and enter your NetBenefits username and password.
- If you **have not** previously set up a NetBenefits username and password, you will need to register to create a username and password in order to access your NetBenefits account.
 - Click **Register as a new user** in the Login page box, and follow the prompts to establish a username and password.
- If you are a current Fidelity customer or **already have** a NetBenefits username and password, but you have forgotten your NetBenefits username and/or password, you will need to reset your username and password in order to access your NetBenefits account.
 - Click **Forgot user name or password** at the top of the home page within the **Login** box, and follow the prompts to reset your username or password.
- When you log on to NetBenefits, you'll be asked to provide your email address and mobile phone number.



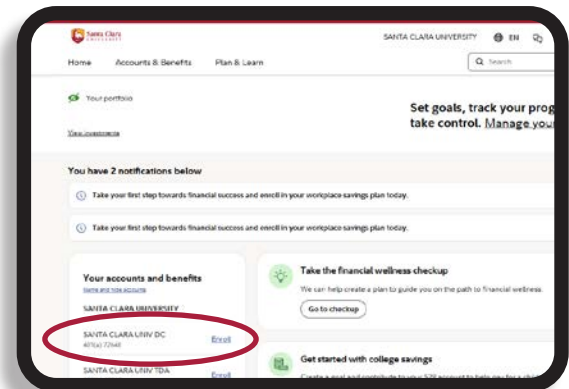


- Click **Start now** at www.netbenefits.com/scu.
- Follow the prompt to log into your account.
- If you are a current Fidelity customer or already have a NetBenefits username and password, you can continue to use them to log on to your NetBenefits account.
- If you have not previously set up a NetBenefits username and password, you will need to register. Click **Register as a new user** in the Log in page box, and follow the prompts to establish a username and password.

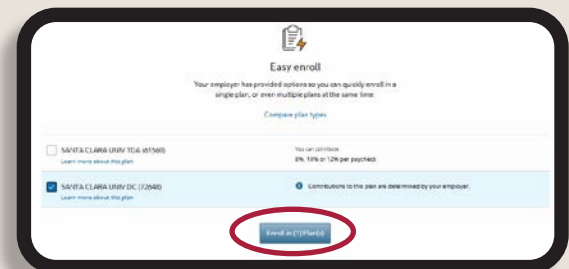


To enroll in the SCU DC/401a Plan:

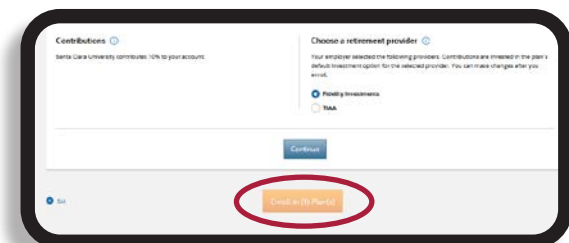
- Click **Enroll** for the DC/401(a) Plan 72648.



- Select the box for the DC/401(a) Plan and click **Enroll in (1) Plan(s)**.



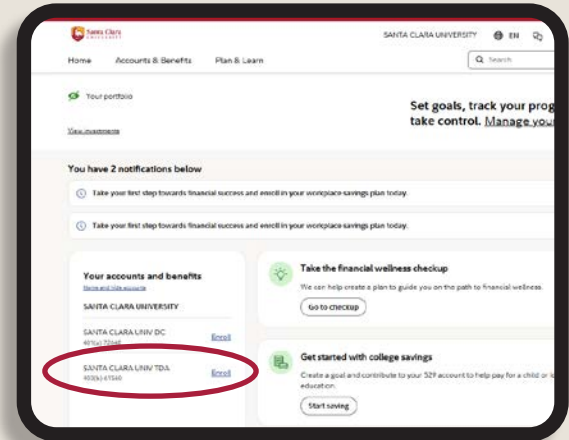
- Select your service provider and click **Continue**. Click **Enroll in (1) Plan(s)** to confirm your selection.



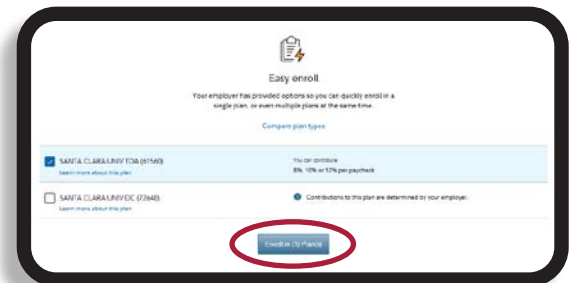


To enroll in the SCU TDA/403(b) Plan:

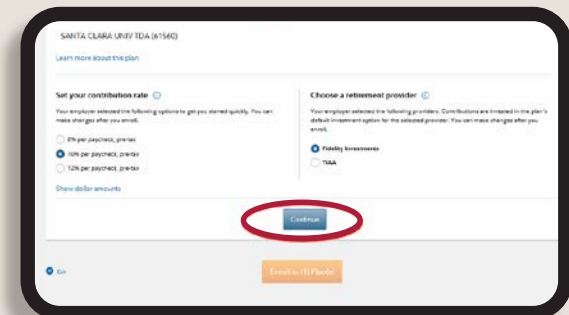
- Click **Enroll** for the TDA/403(b) Plan 61560.



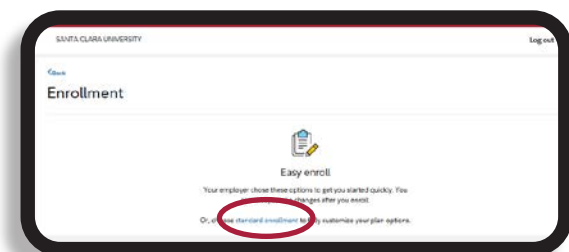
- Select the box for the TDA/403(b) Plan 61560 and click **Enroll in (1) Plan(s)**.



- Select your contribution rate and service provider. Click **Continue**. Confirm your selection by clicking **Enroll in (1) Plan(s)**.



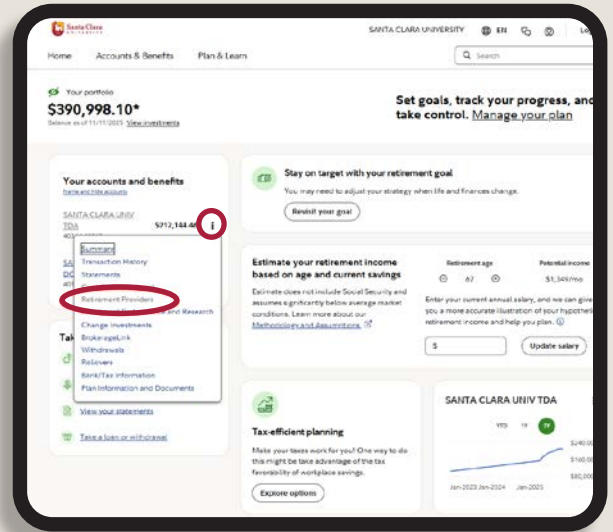
If you prefer a different contribution percentage, click the **standard enrollment** link below.





If you are currently participating in the SCU Retirement Plans, you can change where your contributions are directed online through NetBenefits:

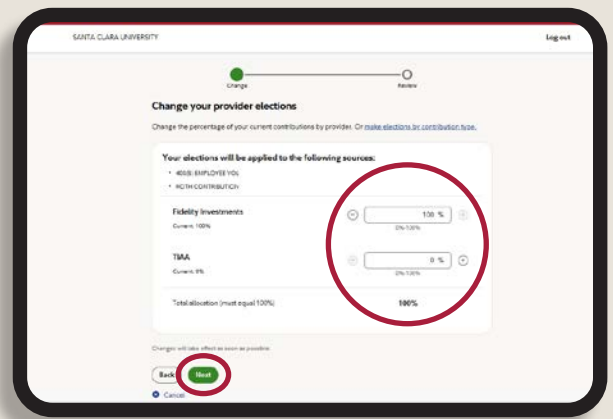
- Log on to your NetBenefits account at www.netbenefits.com/scu.
- From the home page, click the *three dots* to bring up the drop-down menu next to the plan name for which you want to change the retirement provider and select *Retirement Providers*.



- Review your current Retirement Provider selection for each plan. Click *Change your elections*.



- Select the percent you wish to contribute to a given provider. You can select either provider or both. Make sure your total is 100%.
- Click *Next*. Then, click *Submit* to confirm your selection.

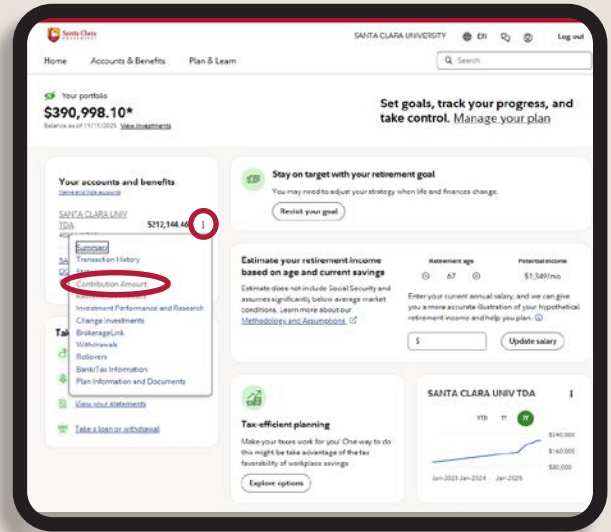




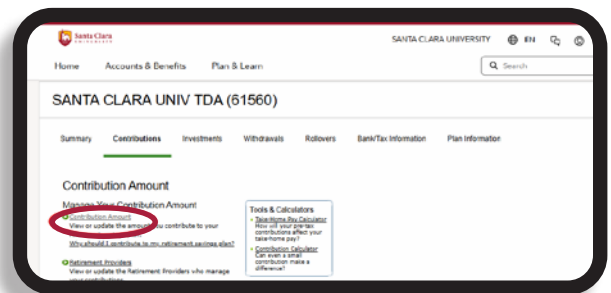
Change Deferral Amount for Your SCU 403(b) Plan

If you are currently contributing to the SCU 403(b) Retirement Plan, you can change your deferral amount online on NetBenefits:

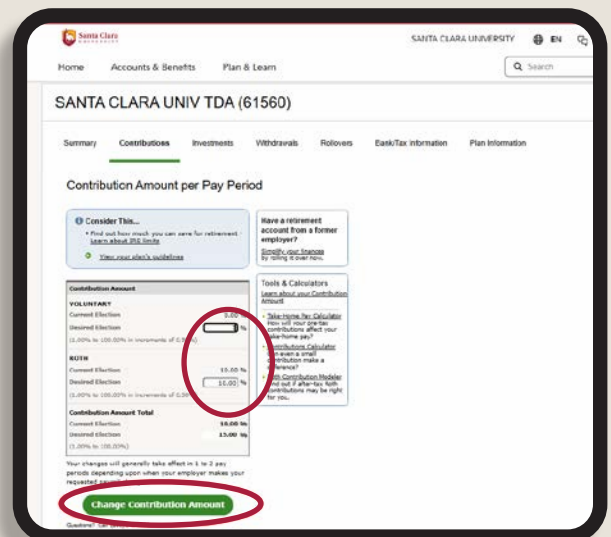
- Log on to your NetBenefits account at www.netbenefits.com/scu.
- From the home page, click the *three dots* to bring up the drop-down menu next to the plan name for which you want to change the contribution amount and select *Contribution Amount*.



- Click on the *Contribution Amount* link.



- Enter the desired election amount. Click *Change Contribution Amount*.

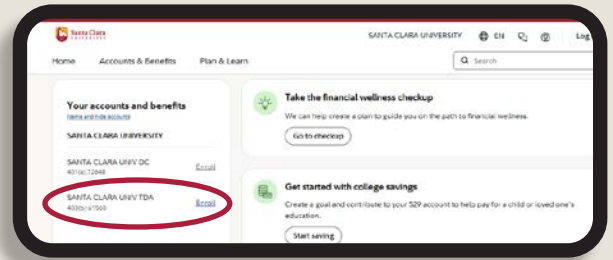


Note: Contributions are per pay.

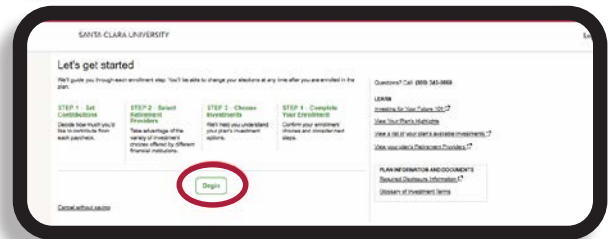
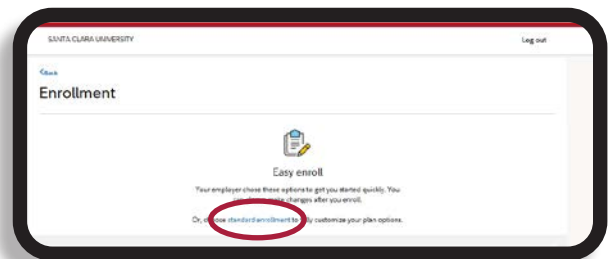


How to opt out of being automatically enrolled in the SCU TDA/403(b) Plan through NetBenefits®:

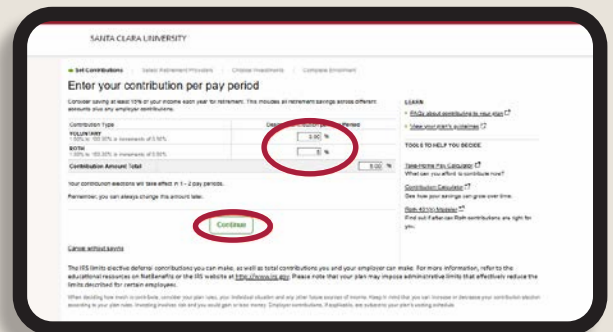
- Log on to your NetBenefits account at www.netbenefits.com/scu.
- From the home page, click the *three dots* to bring up the drop-down menu next to the SCU TDA/403(b) Plan 61560. Click *Enroll*.



- Click on the *standard enrollment* link. Select *Begin* on the next screen.



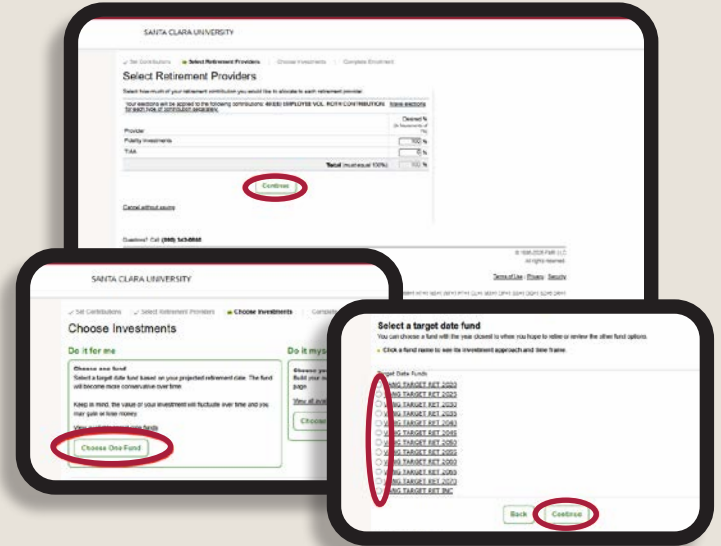
- To opt out of contributing, select **0%** for both Voluntary and Roth deferral amounts.
- If you'd like to contribute a different amount than the default **5%**, enter your preferred percentage. Then, select *Continue*.



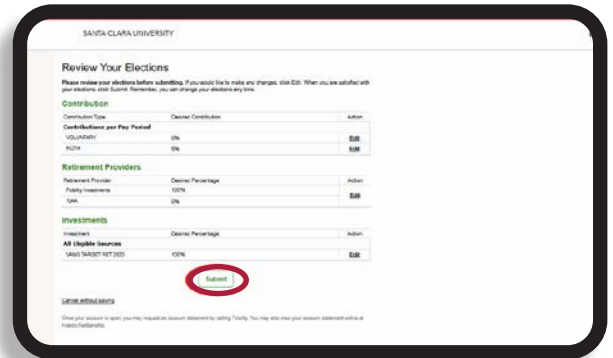


Make Changes During Auto Enrollment *(continued)*

- Click through to select your provider and select and investments. Follow the prompts through the screens. **Note:** Because you are opting out of enrolling, your selections will not apply but are a necessary step to confirm your opt out.



- Review Your Elections* will confirm your zero deferral. Select **Submit**. A pop up box will confirm your Opt Out selection.



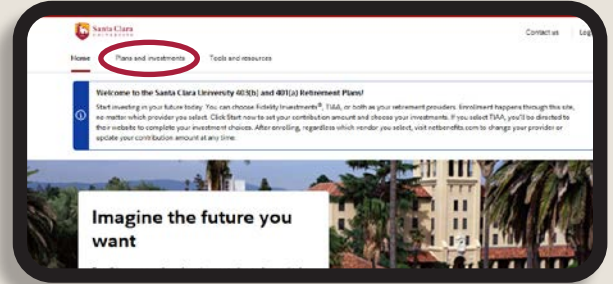


Learn with Fidelity and TIAA

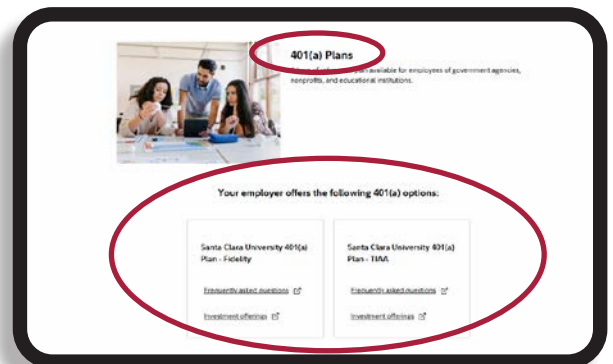
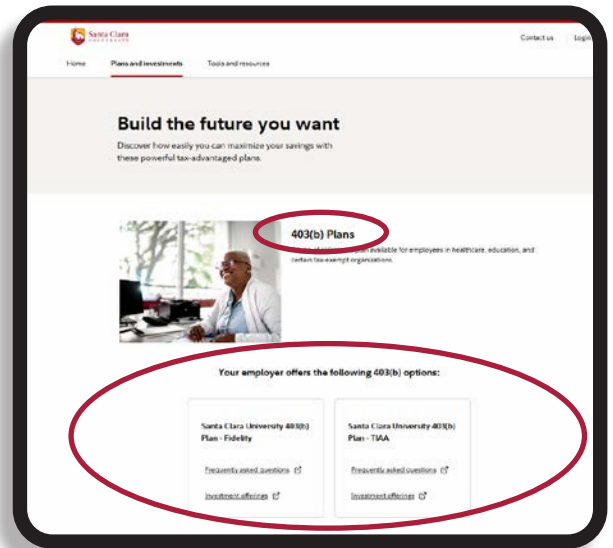
About Your SCU 401(a) and 403(b) Plans

Review the **Frequently Asked Questions** link to learn about your plans. To learn about your investment options, click **Investment Options** for both Fidelity and TIAA.

- Log on to your NetBenefits account at www.netbenefits.com/scu.
- Select *Plans and investment* to learn more about the SCU Plans and investment options for your Fidelity or TIAA accounts.



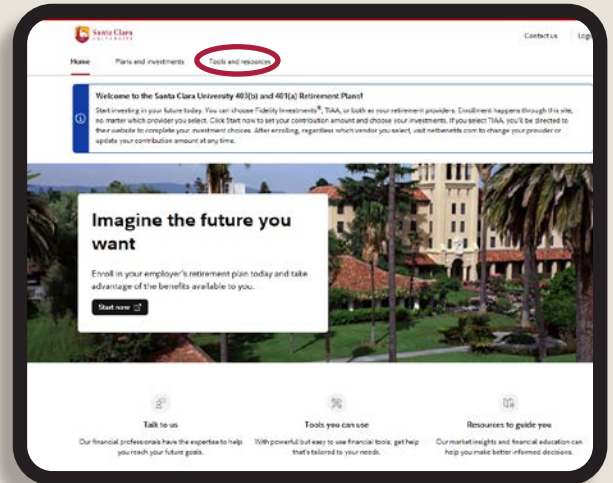
- Review information about the SCU 403(b) Plan or 401(a) Plan.
- Select either Fidelity information or TIAA information.





You can access practical education, easy-to-use tools, and innovative resources and insights to help you make informed decisions.

- Log on to your NetBenefits account at www.netbenefits.com/scu.
- Select the *Tools and resources* tab to review resources available to you.

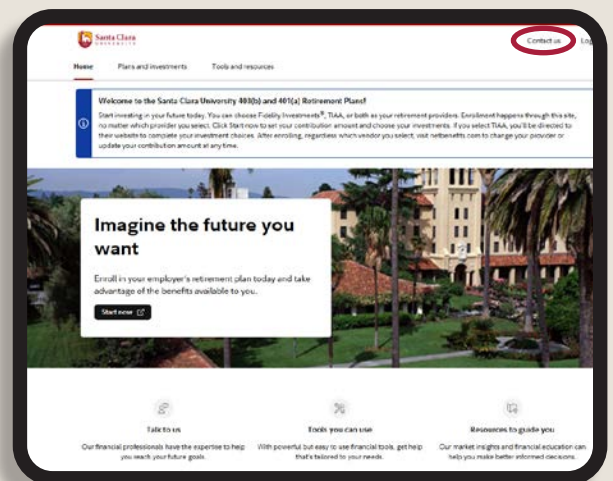


Contact Fidelity and TIAA

Representatives are Here to Help

We are here to help you no matter how you would like to get in touch.

- Log on to your NetBenefits account at www.netbenefits.com/scu.
- Select the *Contact us tab* to call, schedule a time to meet, or log in to your Fidelity or TIAA accounts.



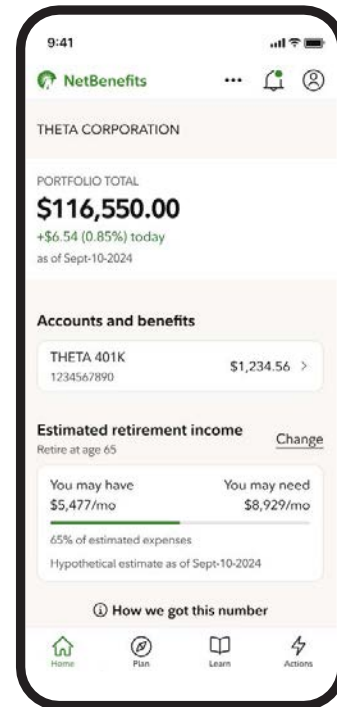


Go Mobile with the NetBenefits® app

Download the NetBenefits® Mobile App to check balances and account performance, select investment options, or change balances among investments and more!



Download the NetBenefits® app for iPhone or Android



Need Help?

Call **800-343-0860** to speak with a Fidelity Representative.

Visit www.netbenefits.com/scu to view plan details and account access links to the SCU retirement providers.



Investing involves risk, including risk of loss.

*System availability and response times may vary.

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