

How to Access and Manage Your Santa Clara University Retirement Plan Accounts Online with NetBenefits®



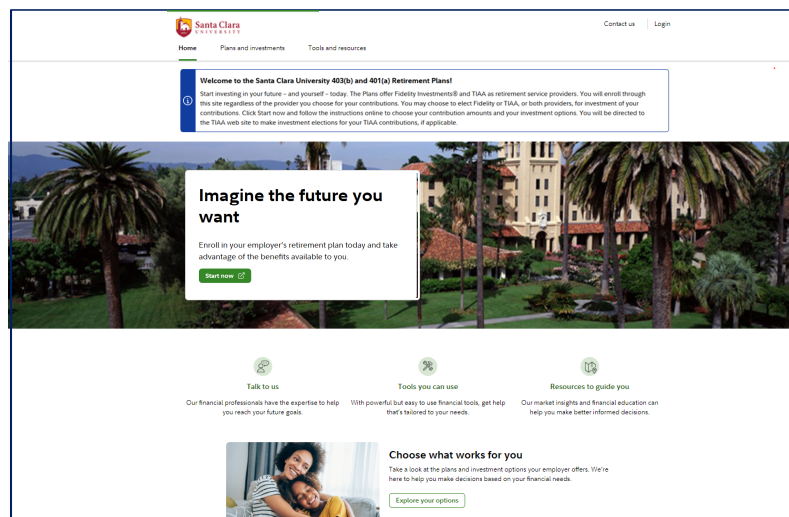
SANTA CLARA UNIVERSITY

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.****



Quick links specific instruction topic



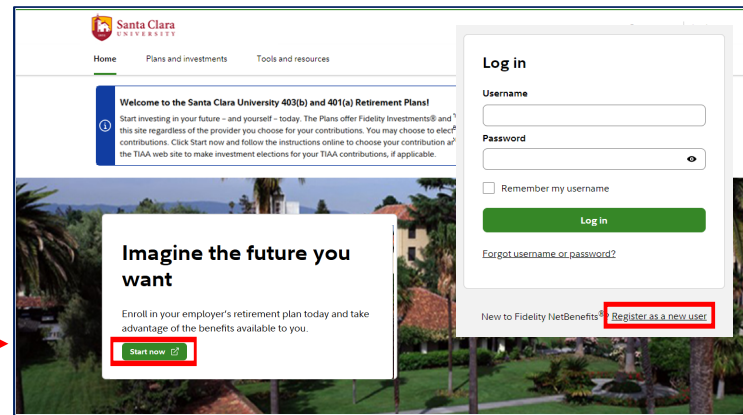
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Click topic below based on what you want to do today. If you are reviewing a printed copy of this guide, turn to the page indicated.

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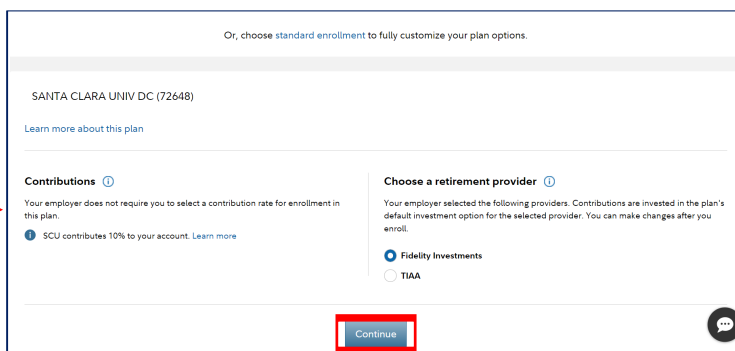
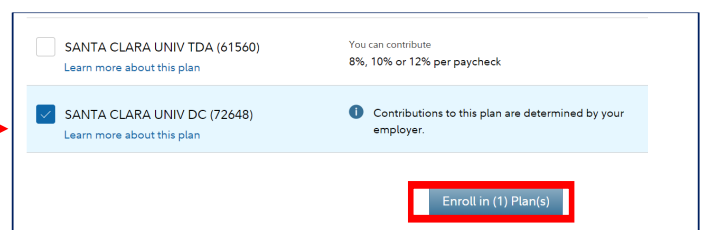
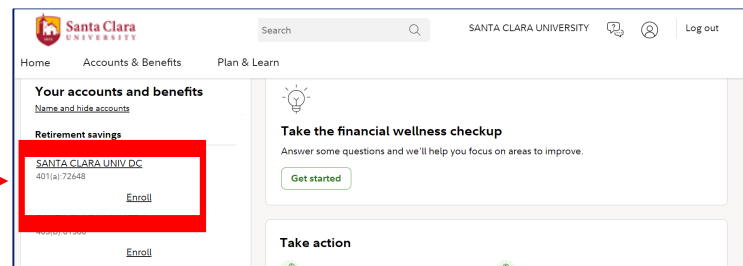
How to Enroll in the SCU DC/401(a) and TDA/403(b) Retirement Plans

- 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 Login page box, and follow the prompts to establish a username and password.



To Select your provider for the SCU DC/401a plan

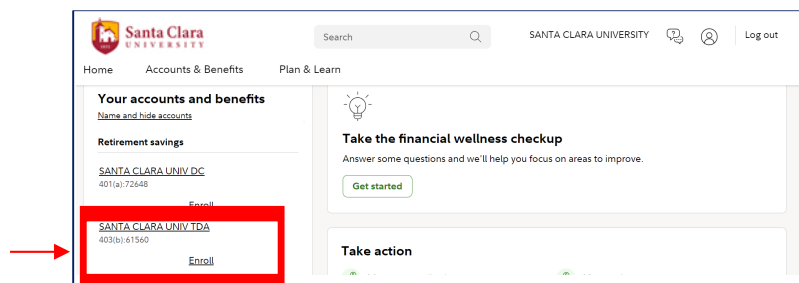
- Click **Enroll** for the DC/401(a) plan 72648.
- Select the box for the DC/401(a) plan and click **Enroll in (1) Plan**.
- Select your service provider and click **Continue**. Click **Enroll in (1) Plan** to confirm your selection.



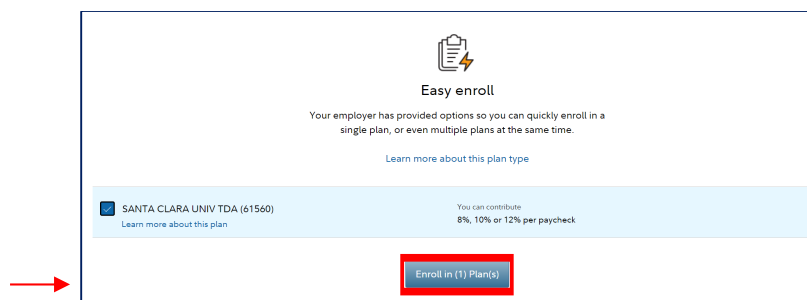
Enrolling in the SCU DC/401(a) and TDA/403(b) Retirement Plans - Con't

To enroll in the SCU TDA/403(b) plan

- Select the TDA/403(b) plan 61560 and click *Enroll*.

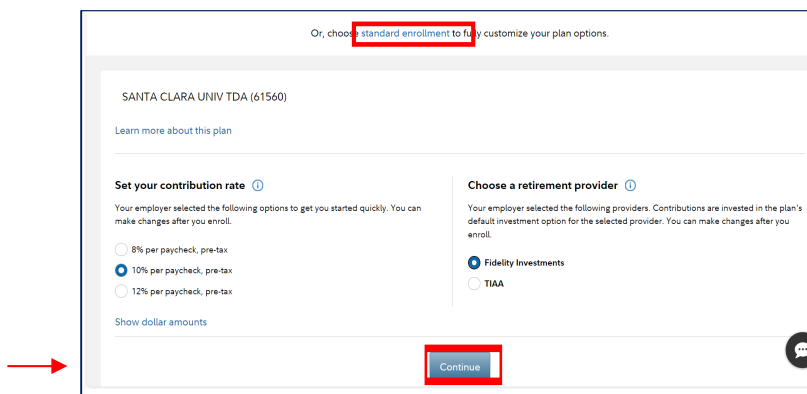


- Select the TDA/403(b) plan 61560 and click *Enroll in (1) Plan*.



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

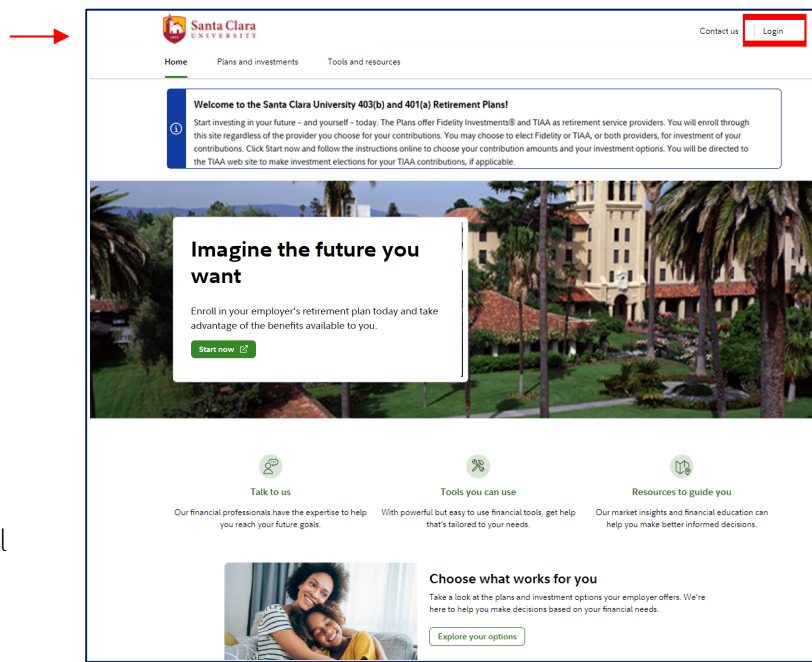
Note: Contribution is per paycheck



If you prefer to enroll through *Standard Enrollment*, click the link at the top of the screen.

How to Log On to Your NetBenefits Account

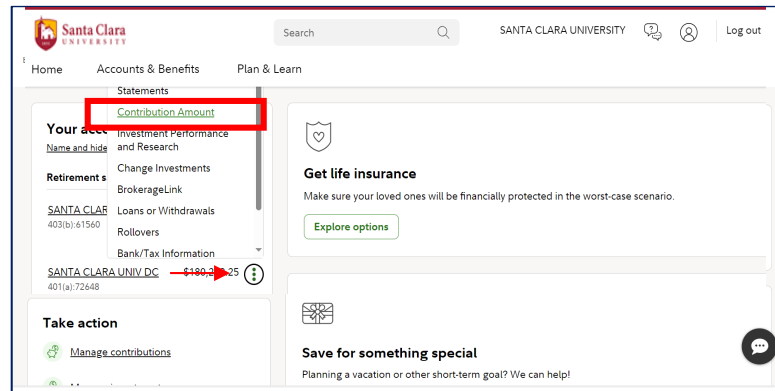
- Log on to your NetBenefits account at www.netbenefits.com/scu.
- If you are a current Fidelity customer or already have a NetBenefits username and password, you can continue to use them to log on to your NetBenefits account.
- At the top right of the home page, select the **Login** button and enter 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 username 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.



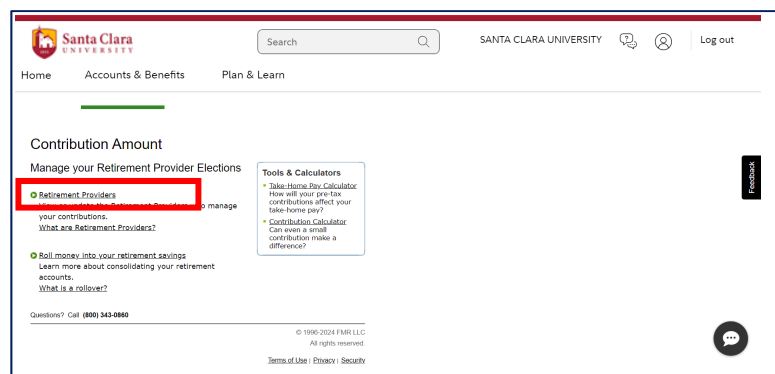
How to Change Your Retirement Provider

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

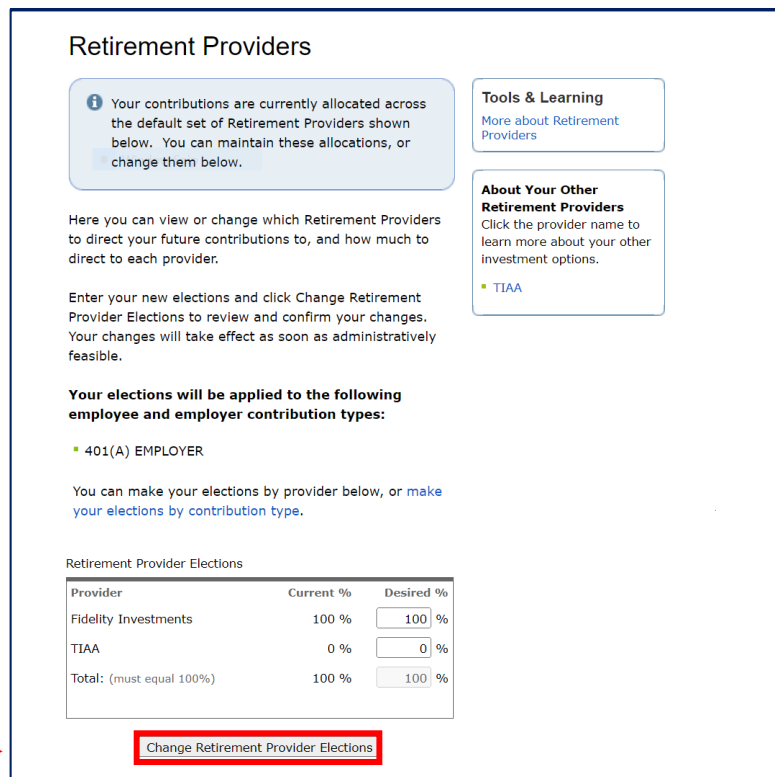
- Log on to your NetBenefits account at www.netbenefits.com/scu.
- From the home page, click the *three dots* to bring up the drop-down menu next to the plan name for which you want to change the retirement provider and select *Contribution Amount*.



- Click on the *Retirement Providers* link.



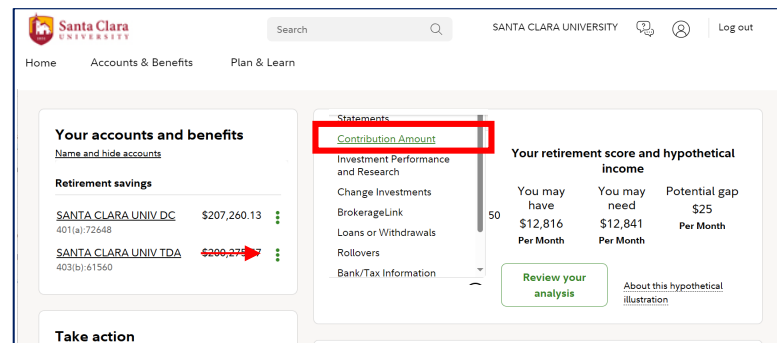
- Follow the screens to change your retirement provider. You can select either provider or both.
- Click *Change Retirement Provider Elections* to submit your changes.



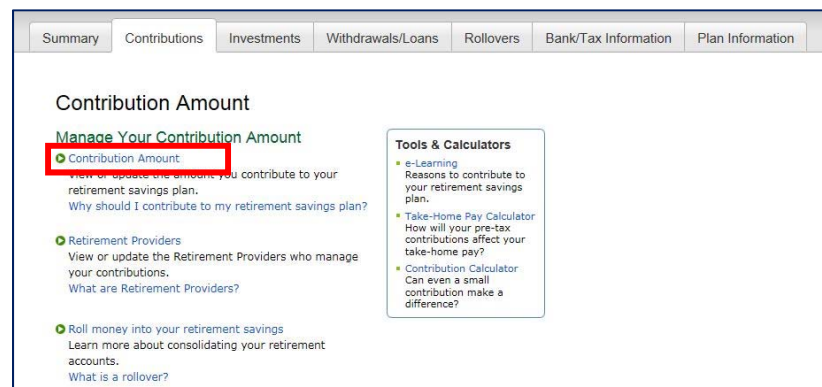
How to Change Your SCU 403(b) Deferral Amount

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

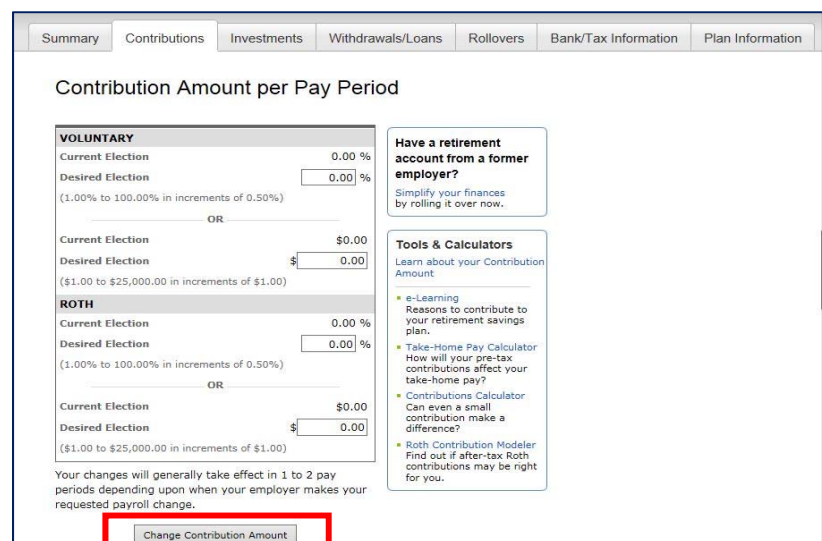
- Log on to your NetBenefits account at www.netbenefits.com/scu.
- From the home page, select the *three dots* to bring up the drop-down menu next to the plan name for which you want to change the retirement provider and select *Contribution Amount*.



- Click on the *Contribution Amount* link. →



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



Note: Contribution is per paycheck

How to Change Your SCU 403(b) Deferral Amount, continued

- *Review and Submit* the change. Click *Submit*.

Review and Submit Contribution Amount

Your changes appear below. To complete your transaction, click Submit. To change your contribution amount, click Previous.

Your Contribution Amount per Pay Period

Contributions	Current	Desired
VOLUNTARY	0%	5%
ROTH	0%	2%

When you click Submit, a confirmation page will be displayed, which you may print and save for your records.

[< Previous](#) [Submit](#)

[Cancel Changes to Contribution Amount](#)

- *Contribution Amount Confirmation* will appear for you to print for your records.

Contribution Amount Confirmation

On August 28, 2019 2:14 PM your Contribution Amount elections were updated. Your changes will generally take effect in 1 to 2 pay periods depending upon when your employer makes your requested payroll change.

Please print and save this confirmation for your records before leaving this page.

Your confirmation number is 192401404W311.

Please make sure your e-mail address is valid.
After this transaction has been processed, we will send an e-mail notification to mbbradysjca@gmail.com, including a link to details of your latest transaction(s).
[Update my e-mail address](#)

Your Contribution Amount per Pay Period

Contributions	Desired
VOLUNTARY	5%
ROTH	2%

Next Steps

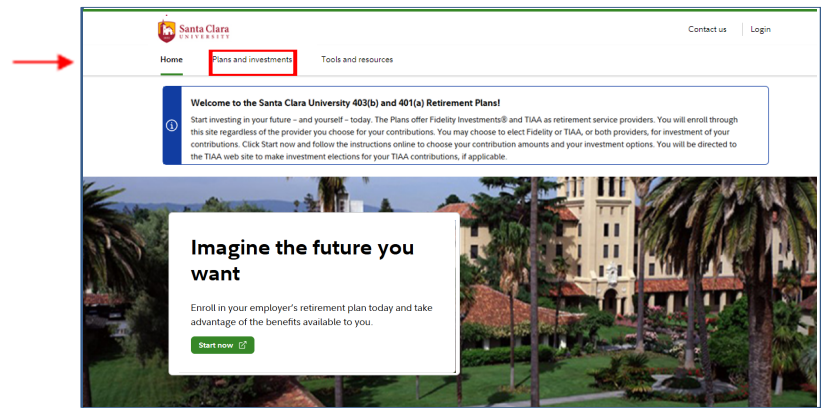
- The market will affect your investments.
[View and update your investment elections.](#)

[Return to Contribution Amount](#)

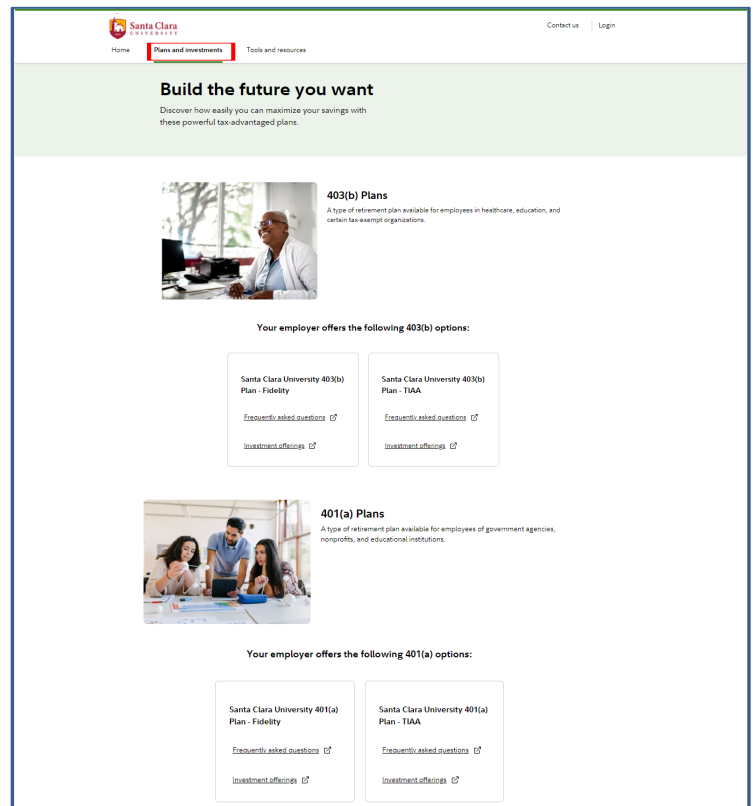
How to Learn about your SCU 403(b) and 401(a) Plans with Fidelity or TIAA

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 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.



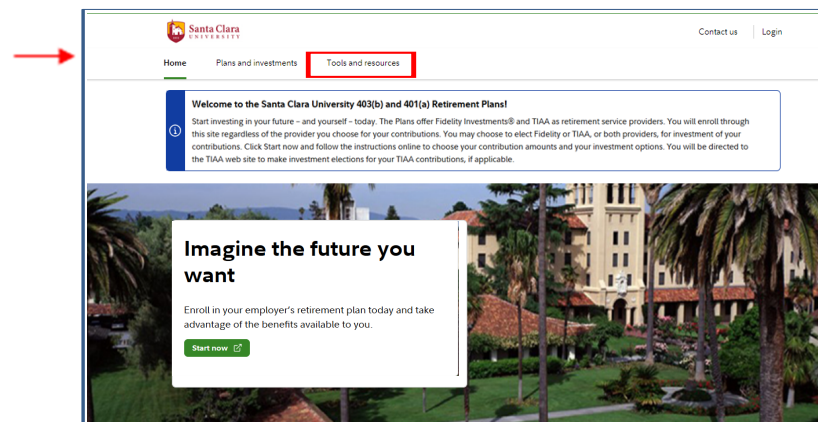
- Review information about the SCU 403(b) Plan or 401(a) Plan.
- Select either Fidelity information or TIAA information.



How to Access Tools and Resources

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

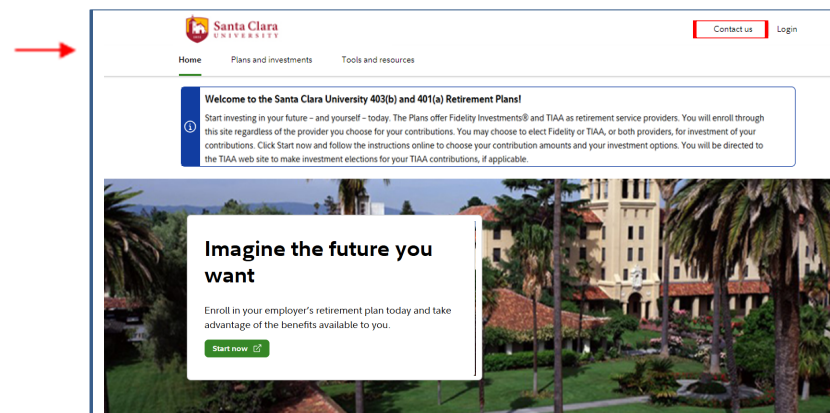
- Log on to your account at www.netbenefits.com/scu.
- Select the *Tools and resources* tab to review resources available to you.



How to Contact a Representative at Fidelity or TIAA

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

- Log on to your 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 App

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



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.

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