

How to Enroll

GEORGE WASHINGTON UNIVERSITY 403(B) RETIREMENT PLAN

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 newly enroll in the GW 403(b) plan, please visit www.NetBenefits.com/GW, or call a Fidelity 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 enroll or change your contribution elections 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 GW 403(b) deferral election.
3. **If using the website:** If you currently have a Fidelity account, you can use your existing Fidelity log in. Otherwise you can register as a new user. Once you are logged in, find the **GW 403(b)** plan in your retirement plan list and select the **Enroll** link.
4. There are 2 ways you can enroll:
 - **Easy enroll:** choose from pre-defined pre-tax contribution and provider options to simplify initial enrollment in the plan. Contributions will be invested in your provider's default fund.
 - **Standard enrollment:** customize your enrollment and choose any percentage of pay to contribute to the plan either pre-tax or post-tax Roth, choose how to split contributions between providers, and elect how to invest your contributions.
5. **If you choose TIAA** as an investment provider, please complete enrollment at www.tiaa.org/gwu or contact TIAA directly at **(800) 842-2776**. TIAA participants can update their investment elections through their TIAA account.
6. **Designate your Beneficiaries** through your Fidelity or TIAA online account.

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

Fidelity Investments
(800) 343-0860
www.NetBenefits.com/GW

TIAA
(800) 842-2776
www.tiaa.org/gwu

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.

Information was provided by the George Washington University. Fidelity Investments is not responsible for its content.