

# Helping you get more for retirement

When it comes time for retirement, you want to be ready. Enrolling in the Chapman University 403(b) Plan and/or the Chapman University 401(a) Plan is an important step in that direction, and Fidelity Investments is here to help you.

As a leading retirement provider to colleges, we have built our reputation on helping individuals pursue their financial goals, and we're ready to help you feel more confident about saving for retirement.



## Fidelity is here to:

### Help you make the most of your retirement benefits.

We'll review your plan benefits and help you decide how much to contribute and invest to meet your retirement goals.

### Offer a range of investment options to help build a well-balanced portfolio.

Fidelity's broad selection of funds and commitment to investment management, through all kinds of markets, give you everything you need to help build a diversified portfolio.

### Together with you every step of the way.

Our Workplace Financial Consultants are noncommissioned\* professionals dedicated to higher education retirement programs like yours. You can meet one on one in person, or by phone, to develop an action plan for retirement.

\*Base salary plus variable compensation based on manager evaluation, including participant engagement.

### Ensure exceptional service so your money works harder for you.

Whether it's getting answers, tapping into educational insights, or processing a transaction, Fidelity provides responsive 24/7 service.<sup>1</sup> with research and planning tools that add up to great value.<sup>2</sup>

► To learn about your plan or to enroll online, go to [NetBenefits.com/atwork](http://NetBenefits.com/atwork) or call **800.343.0860**, Monday through Friday, 8 a.m. to midnight Eastern time.

► To schedule a complimentary one-on-one appointment, call Fidelity at **800.642.7131** or, to register online, go to [fidelity.com/schedule](http://fidelity.com/schedule).



# Enroll today.

## Your quick guide to getting started

Don't overlook the benefits of the Chapman University 403(b) Plan and the Chapman University 401(a) Plan. The tax advantages and growth potential that come with making regular retirement plan contributions are an effective way to save for your financial future. Plus, Chapman University will match a portion of your contributions—that's like getting "free" money. Learn more about your plan features at [NetBenefits.com/atwork](https://NetBenefits.com/atwork) or call **800.343.0860** for assistance.

# 1

## Enroll Online

- **Step A:** Go to <http://enrollonline.fidelity.com> to set up your Chapman University account(s).
- **Step B:** Have your Chapman University Plan ID Number ready to set up your account(s):
  - **61289**—Chapman University 401(a) Plan **and/or**
  - **89693**—Chapman University 403(b) Plan

You will need to enter the Plan ID number as the plan's identification number in order to set up your account(s).

- **Step C:** Follow the prompts to enroll: Select Location Code: BRND. Once your account is set up, you will be led to Fidelity NetBenefits® to create a password and choose an investment mix for your contributions.

## Resources

A description of your investment options is available at [NetBenefits.com/atwork](https://NetBenefits.com/atwork). If you are unable to view or print this information, call **800.343.0860** to receive an enrollment guide.

# 2

## Designate Your Beneficiary

It's important to designate a beneficiary for your account, and you should review this periodically, especially when you experience a life-changing event such as marriage, the birth of a child, or a death in the family.

## Resources

Fidelity's Online Beneficiaries Service, available through Fidelity NetBenefits, offers a straightforward, convenient process that takes just minutes. Simply log in to NetBenefits® at [NetBenefits.com/atwork](https://NetBenefits.com/atwork) and click *Profile*, then *Beneficiaries*. If you do not have access to the Internet or prefer to complete your beneficiary information by paper form, please call **800.343.0860**.

*Investing involves risk, including risk of loss.*

<sup>1</sup>There is a maintenance period when some services may not be available.

<sup>2</sup>Benefits may vary depending on your relationship with Fidelity.

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