



## Important changes to the DePauw University Grantor Retiree Healthcare Savings Plan

Helping you plan and save for the future is important to DePauw University. Beginning in February 2025, the DePauw University Grantor Retiree Healthcare Savings Plan will move from Nyhart/Charles Schwab to TIAA. Most of the changes described in the included brochure also apply to the Grantor plan. You should review this brochure and enclosed notice to learn how this will affect your account.

### What is the DePauw University Grantor Retiree Healthcare Savings Plan?

The plan gives you a valuable opportunity to build tax-free assets you can use to pay for medical insurance premiums in retirement. Now that you're retired, you are able to use these funds to be reimbursed for fully insured medical plan premiums.

Unlike the VEBA plan, there will be no debit card issued for this plan. You will be able to submit reimbursement requests through one of the following channels:

- 1) Online claims portal
- 2) The TIAA mobile app
- 3) Paper claims form

### Key dates

Dates (2025)	Events
	Last day to submit claims to Nyhart/Charles Schwab.
Feb. 19	At 4 p.m. ET, the blackout period is expected to begin. During this time, you will be unable to modify your Nyhart/Charles Schwab account.
Feb. 24	The new retiree healthcare savings plan accounts created at TIAA. You will receive an enrollment confirmation.
Feb. 25	A group seminar to review the changes and ask questions will be held at 10 a.m. in the University Ballroom in The Memorial Student Union Building.
	Account balances expected to transfer from Nyhart/Charles Schwab to TIAA.
Feb. 27	A live webinar will be held at 2 p.m. to review the changes and ask questions. Register at <a href="https://webinars.on24.com/client/TIAAandDePauw">webinars.on24.com/client/TIAAandDePauw</a> .
On or about Mar. 14	Blackout period expected to end. You can view your new account at TIAA, update your investment choices and start submitting claims reimbursement requests if you are an eligible retiree.

**Important note:** The date of the transfer/the end of the blackout period depends on the accurate, timely transfer of data and assets from Nyhart/Charles Schwab to TIAA. If this does not occur, the end of the blackout period could be delayed.

## Manage your account

Not sure where to begin? These plan changes are an excellent opportunity to revisit your retirement planning strategy. We can help you take the next step in your financial plan.

- **Online:** Visit [tiaa.org/depauw](https://tiaa.org/depauw) and log in. If you're new to TIAA, select *Log in*, then *Need online access?* Follow the on-screen prompts.
- **Phone:** Call TIAA at 877-554-1004 and choose option 1, weekdays, 8 a.m. to 10 p.m. ET.
- **Schedule a one-on-one counseling session:** To schedule a one-on-one session, call **800-732-8353**, weekdays, 8 a.m. to 8 p.m. ET. You can also schedule a meeting online at [tiaa.org/schedulenow](https://tiaa.org/schedulenow).

## Disclosures

Interests in any retiree healthcare plan discussed herein are offered solely by the employer.

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