

# Making Changes to the SUNY Voluntary 403(b) Savings Plan

## Making retirement account changes with Retirement@Work

Retirement@Work is the online enrollment and management system for the State University of New York Retirement Plan. You can return to Retirement@Work anytime to:

- Change your investment providers for your Optional Retirement Program (ORP) and Voluntary 403(b) Savings Plan (VSP)<sup>1</sup> accounts.
- Manage (start, stop, restart, increase or decrease) your 403(b) salary deferral elections online.
  - If you are starting new contributions, click on the *Set up contributions* button.
- Enroll in the pre-tax (Traditional) and/or after-tax (Roth) option.
- View your VSP account balance.
- Make informed decisions with consolidated views of your current and historical account information—including account balances, contributions and distributions across all providers.

Employees may only view and manage their ORP and 403(b) accounts with Retirement@Work. The Defined Benefit Plan—NYS Retirement Plans (TRS or ERS), New York Police and Fire Retirement System (PFRS) as well as the NYS Deferred Compensation Plan—are not administered by Retirement@Work. For additional information on these benefit programs and individual advisors available for your campus, please refer to [suny.edu/retirement](http://suny.edu/retirement).

## Make changes

### 1. Visit [retirementatwork.org/suny](http://retirementatwork.org/suny)

Click *Already registered* and log in with your credentials. You may be asked to verify your identity through a one-time passcode or security questions.

### 2. Open and manage your retirement plan

Click on *My retirement* under **Make Changes**.

### 3. Location

Select your location by clicking *Continue*.

### 4. Contributions

On the **Contributions** tab, if you are starting new contributions, click on the *Set up contributions* button. If you are changing your contributions, click on the *Manage contributions* button.

- If you need to stop contributions, click on the *Stop voluntary contributions* link. Check the box to accept the Terms and Conditions, then click on the *Stop contributions* button.

### 5. Let's set up your retirement contributions\*

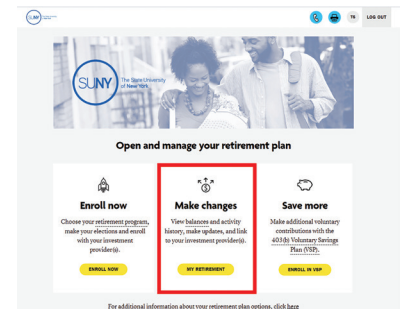
Change your amount per pay period to the desired amount. Check the box if you wish to allocate between pre-tax (Traditional) and/or after-tax (Roth). Select the effective date and click *Next*.

### 6. Who would you like to handle your retirement investments?

If needed, update the amount of your pre-tax (Traditional) and/or after-tax (Roth) contributions that you wish to allocate to each investment provider. Click *Next*.

### 7. Review your contributions

Review the Terms and Conditions of the Salary Deferral Agreement, and check the box to accept. Click *Confirm*.



\*If you elect to contribute a flat dollar amount that exceeds the amount available in your net pay, a partial deduction will be made equal to the amount of net pay available. This will result in a \$0 net paycheck.

**8. Confirmation: Your elections were submitted**

You will now be prompted to visit the enrollment website of each of the investment provider(s) you selected to open an account (if you do not have one already) and select your investments. Click the name of your selected investment provider(s) to be taken directly to their account enrollment page.

Please note: You will exit Retirement@Work and be taken to each provider’s enrollment website to complete this task. If you selected more than one provider, you must return to this page and click each provider’s name to complete the process.

If you have questions about investment options and services, contact the investment provider(s) directly:

<b>Corebridge Financial (formerly AIG Retirement Services)</b>	<a href="https://corebridgefinancial.com/rs/suny">corebridgefinancial.com/rs/suny</a>	<b>603-594-8340</b>
<b>Fidelity</b>	<a href="https://netbenefits.com/SUNY">netbenefits.com/SUNY</a>	<b>800-343-0860</b>
<b>TIAA</b>	<a href="https://TIAA.org/suny">TIAA.org/suny</a>	<b>866-662-7945</b>
<b>Voya</b>	<a href="https://suny.beready2retire.com">suny.beready2retire.com</a>	<b>800-584-6001</b>

**Need help?**

If you need assistance with the Retirement@Work system, **call 866-271-0960**, weekdays, 8 a.m. to 10 p.m. (ET). You will be connected with one of our experienced Retirement@Work consultants.

If you have questions regarding SUNY retirement benefits, please contact your campus benefits administrator.

<sup>1</sup> Employees of Roswell Park Cancer Institute, the New York State Education Department (NYSED), the SUNY Contract Colleges@Cornell, or the NYS VDC Program are not eligible to participate in the SUNY Voluntary 403(b) Savings Plan.

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