

Quick Start Guide

Everything for your employer's retirement plan.
In one location.

Welcome to Retirement@Work®, where you can:

- Enroll in Iowa State University (ISU) retirement plan(s)
- Change your voluntary contribution amount at any time
- Choose your preferred retirement plan provider(s)
- View your ISU retirement plan balances across plans and investment providers
- Access tools and resources for planning

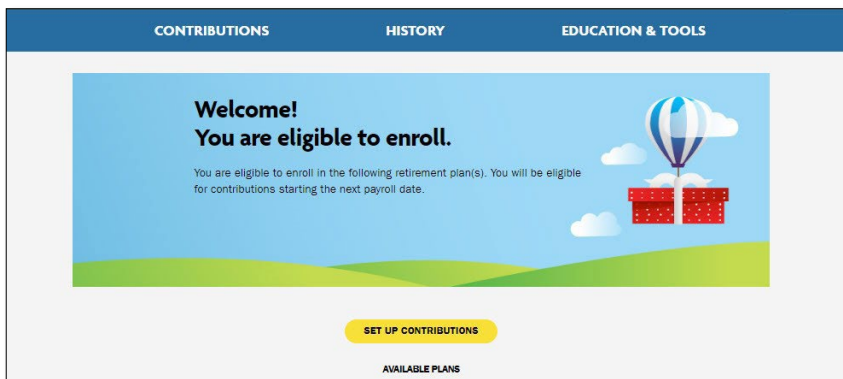
1. Access Retirement@Work

Log in to Okta on the ISU sign-on page. Then you can follow the steps in this **job aid** to add the Retirement@Work Okta tile to your dashboard.

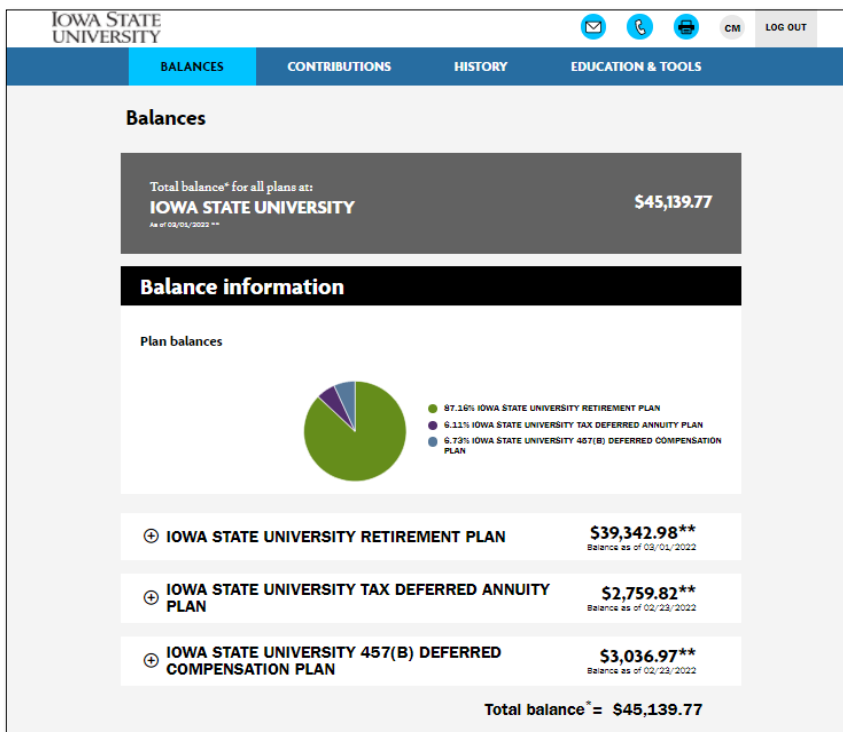
Once it is added, you can simply click the Okta tile to access the Retirement@Work site to update your contribution amount or change your vendors.

2. Set up and manage your contributions

First time users: Click *Set Up Contributions*.



Returning users: You will be taken to the *Balances* tab where you can view your total balance in the plans, regardless of provider. To change your contributions, go to the *Contributions* tab and click *Manage Contributions*.



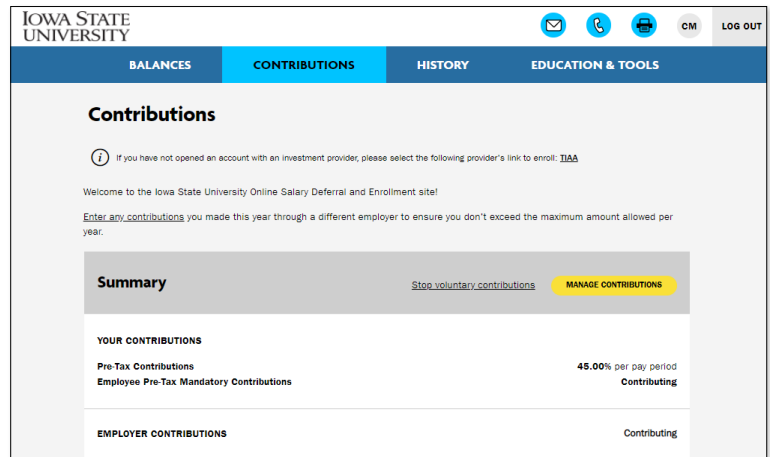
Click the + next to each plan to read more information and review available investment providers.

On the next page, enter the amount you want to contribute to the voluntary plan(s) per pay period and when you want contributions to start. For each, you will choose a dollar amount, a percentage or the maximum amount allowed.

- If you enter a percentage, you'll see an estimate of your dollar contribution per pay period.
- If you enter a dollar amount, you'll see an estimate of your percentage contribution per pay period.

Click the indicated button to split your contributions between pretax and Roth.

On this page, you can also choose to automatically increase your contributions.

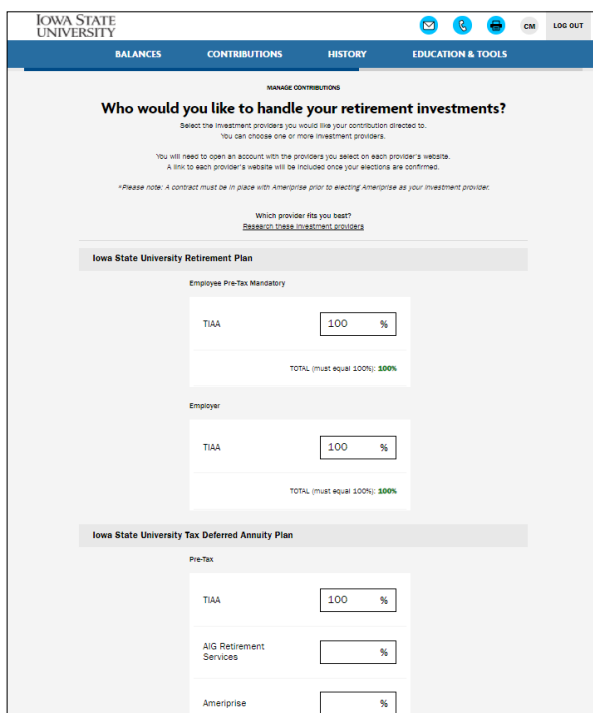


3. Select investment providers

Decide if you want to direct all of your contributions to the same investment provider(s) and click Yes or No.

- If you choose Yes, all plans in which you contribute and all contribution types—which, based on your plan(s), may include employee contributions, Pre-Tax, and Roth—will be directed to the same investment provider(s) in the same percentages.
- If you choose No, you will then make your choices by individual plan and contribution type.

Enter the percentage you wish to allocate to each provider. Ensure your total equals 100 percent for each plan.



The Iowa State University Retirement Plan (mandatory plan) only offers TIAA as an option. Select 100% for both the Employee Pre-Tax Mandatory and the Employer sections.

If you choose Ameriprise as a vendor on your voluntary TDA Plan, you must first have a contract in place with them.

4. Review your contributions

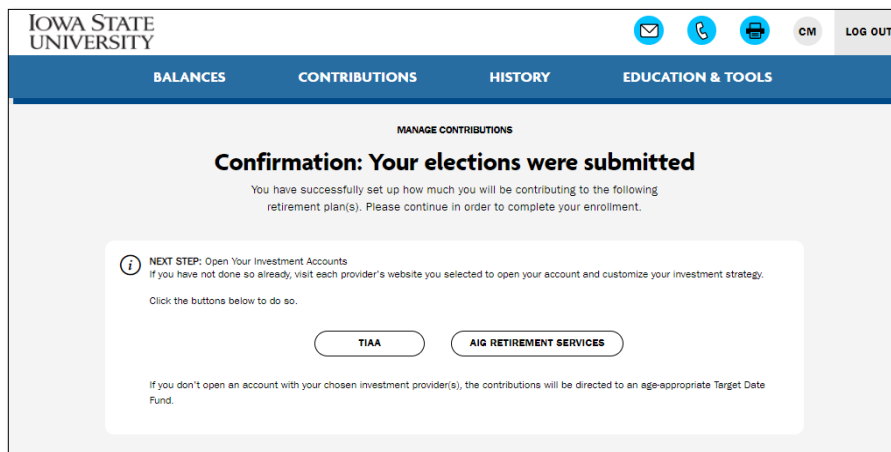
Check to be sure your desired selections are reflected in the summary.

If they are not, click the *Edit* button to make changes.

Once your selections are shown, review the “Terms and Conditions,” check the box, then click *Confirm*. The next page will confirm that your elections were submitted.

5. Open your investment account(s) and select investments

Click the name of each provider you selected to open an account with them (if you do not have one already) and select your investments by plan. You will exit Retirement@Work and be taken to each provider’s website to complete this task. If you selected more than one provider, **you must return to this page** to click each provider’s name to complete the process.



If enrolling with AIG, you will be required to enter a plan number once on their website to continue enrollment:

403(b) Plan:

Pre-Tax: 0479100102

Roth: 0479101012

457(b) Plan:

Pre-Tax: 047910312

Roth: 047910313

Need help? We've got you covered.

Site support

Call Retirement@Work at **844-567-9090**, weekdays, 7 a.m. to 9 p.m. (CT).

Advice and education

You can get help deciding how to create the right investment mix with your chosen investment provider(s), over the phone or in person.

- TIAA: **800-842-2252**
- AIG: **515-440-3000**
- Ameriprise Financial: **515-233-5402** (Colette Gunhus) or **515-253-8200** (Emily Mickelson)

General plan questions

Call Angela Elthon at **515-294-1089** or email at amelthon@iastate.edu.

Learn more

Visit [Iowa State HR Website](#)

This short video provides a step-by-step visual guide to using Retirement@Work. [Watch the video here.](#)