CONTRIBUTION CHANGES

- View and/or change your contribution percentage
- View and/or change the split between your pre-tax and Roth contribution percentage
- Join the annual increase program to automatically increase your contribution each July 1
- Change your recordkeeper election between Fidelity and TIAA

Fidelity is the Master Administrator for the RIT Retirement Savings Plan. This means that you have the streamlined ability to enroll in the Plan and make changes, whether you contribute to Fidelity, TIAA, or both.

Log in at [www.fidelity.com/atwork](http://www.fidelity.com/atwork). You can set up a login if you do not have one by clicking on Register Now at the top of the page and follow the prompts.

1. Once logged in, click on the drop down arrow to the right of Quick Links and choose Contribution Amount. If you are already logged in, click on the Contributions tab.
2. There are three choices
   a. Contribution Amount (to view and change your contribution percentage and/or the split between pre-tax and after-tax Roth contributions)
   b. Annual Increase Program (to enroll or change participation in the program to automatically increase your contribution effective each July 1)
   c. Retirement Providers (to view and change the allocation for your future contributions between the two recordkeepers, Fidelity and TIAA)
3. Choose your desired transaction and follow the prompts.
4. If you make any changes, be sure click on Submit.

**NOTE:** If you elect to have some or all of your contributions go to the Roth source, you should verify that the investment election for the Roth source is set as you desire. See below on how to view and change your investment elections.

If you prefer, you can make these changes by phone; call Fidelity at 1-800-343-0860/V and 1-800-259-9734/TTY.

INVESTMENT CHANGES-FIDELITY

- Change your investment election for future contributions
- Change the investment mix for your current balance (Fidelity calls this Exchanges)

Log in at [www.fidelity.com/atwork](http://www.fidelity.com/atwork). You can set up a login if you do not have one by clicking on Register Now at the top of the page and follow the prompts.

1. Once logged in, click on the drop down arrow to the right of Quick Links and choose Change Investments. If you are already logged in, click on the Investments tab and then the Change Investments link.
2. To change where your future contributions are invested, click on Future Investments.
3. To change your current investment mix, click on the appropriate box.
4. Follow the prompts.

If you prefer, you can make these changes by phone; call Fidelity at 1-800-343-0860/V and 1-800-259-9734/TTY.

INVESTMENT CHANGES-TIAA

- Change your investment election for future contributions
- Change the investment mix for your current balance

Log in at [www.TIAA.org/rit](http://www.TIAA.org/rit). You can set up a login if you do not have one by clicking on Register at the top of the page and follow the prompts.

1. Once logged in, click Manage My Portfolio and then Manage Investments.
2. Follow the prompts to make your changes.

If you prefer, you can make these changes by phone; call TIAA at 1-800-842-2776/V 1-800-842-2755/TTY.

TRANSFER INVESTED BALANCES

If you would like to transfer some or all of your invested balance from Fidelity to TIAA, contact TIAA. If you would like to transfer some or all of your invested balance from TIAA to Fidelity, contact Fidelity.