

# UW Physicians Employment Transition

## Support Resources for UW Benefits Enrollment

### Fidelity

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Fidelity consultants familiar with both UW and UWP retirement plans will provide educational presentations and one-on-one consulting for UWP staff. Both the UW and UWP use Fidelity Investments as the recordkeeper for their retirement plans, which means these consultants can help staff navigate the closure of the UWP retirement plans, and learn about the new retirement and savings options at the UW.

#### FIDELITY PRESENTATIONS | 1 HOUR

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These one-hour presentations will include details about UW 403(b) retirement and savings plans, including the plans' low-cost investment options and fees. Staff will learn about the funds available in Tier 1-Target Date Funds, Tier 2-UW-selected funds, Tier 3-TIAA Annuities and Tier 4-Brokerage Link.

Options for moving UWP plan balance(s) under the IRS rules will also be provided. Those interested in rolling over their UWP account to the UW Voluntary Investment Program (VIP) 403(b) can receive more assistance with that process during the one-on-one sessions.

**Registration is *not* required;** space will be available on a first come, first served basis.

DAY	DATE	TIME	LOCATION
Tuesday	November 19	6:30–7:30 a.m.	Rainier
Tuesday	November 19	11:30 a.m.–12:30 p.m.	Rainier
Tuesday	November 19	3–4 p.m.	Rainier

#### FIDELITY CONSULTATIONS | 30 MINUTES

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These one-on-one consultations provide an opportunity for staff to meet with a Fidelity retirement consultant to ask personal questions about UWP or future UW 403(b) retirement and savings plan(s). Fidelity will provide information about UW plans and investment allocations available, the contributions and IRS limits for each plan, and options for UWP savings once the plan closes on December 31, 2019. Fidelity cannot answer specific questions about the Department of Retirement Systems (DRS) plans (PERS and TRS).

**Registration is required.** To see the schedule and to register for a consultation, go to the UWP Fidelity portal: [NetBenefits.com/UWP](https://NetBenefits.com/UWP). Click the "Contact Us" tab, click "Meet," then select a location and choose your desired appointment date and time.

#### QUESTIONS?

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