it's all about **YourBenefits**

Northwestern | myHR Benefits

Accessing, Reviewing, and Updating Savings Plans

Northwestern has partnered with Fidelity to provide enhanced services for the Savings Plans offered to faculty and staff. The new functionality offers:

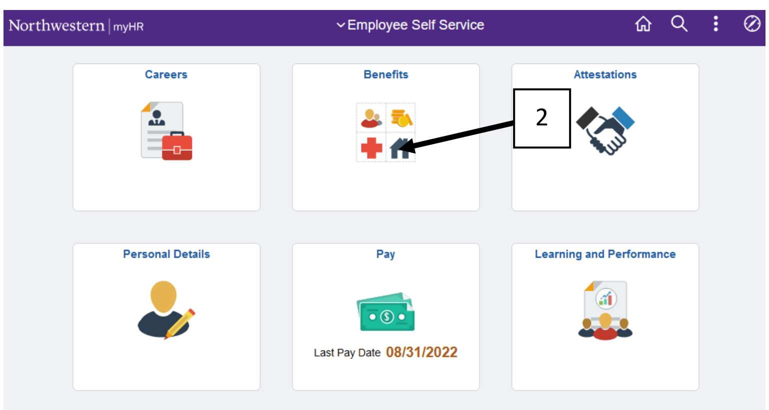
- Seamless integration of enrollment and educational information for retirement planning;
- Single sign-on from myHR, providing improved security;
- Retirement Service Center providing support to all our plan participants;
- Minimal delay between time of deferral election and payroll deduction.

This guide will provide a high level overview of how to access Savings Plans information, update your monthly deferrals, direct funds to Northwestern's two Retirement Account providers, and update investments.

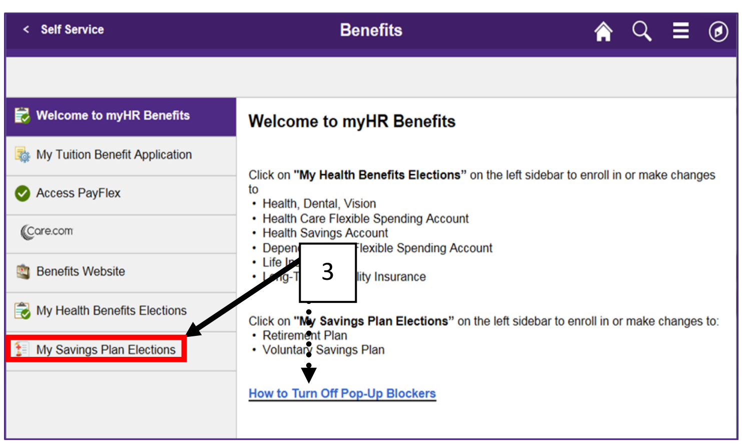
Accessing Savings Plans

NOTE: If you have TIAA as a Retirement Provider, Beneficiaries are maintained separately on TIAA's website.

1. Login to myHR at https://www.northwestern.edu/myhr/
2. Select the **Benefits Tile**



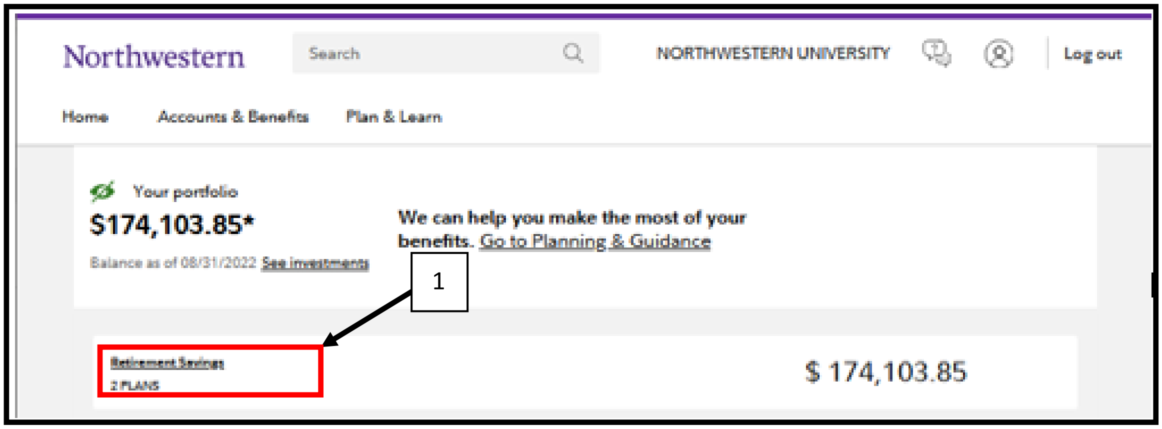
3. Select **My Savings Plan Elections** on the left hand side (if nothing happens use the *How to Turn Off Pop-up Blocker* guide located provided)



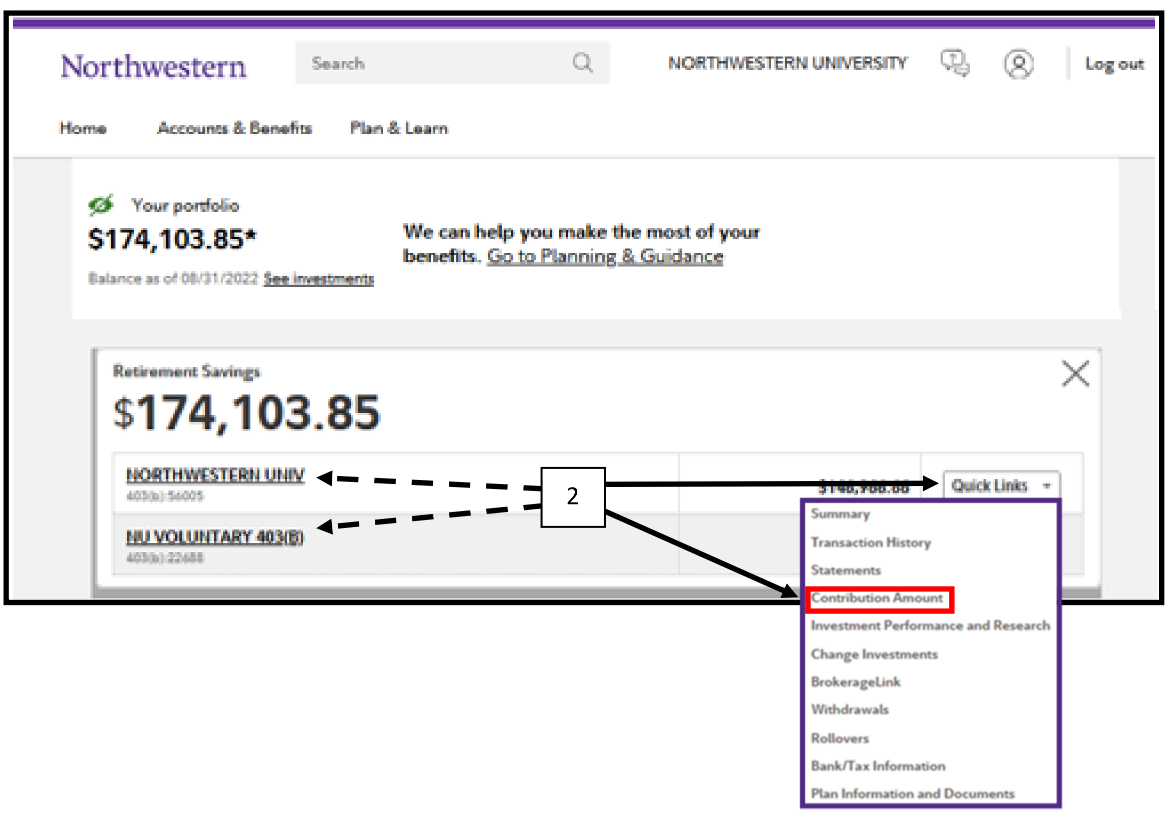
Review/Update Deferrals

NOTE: The total amount indicated for your Retirement Savings account will not show the TIAA balance. The individual breakdowns do show the balance.

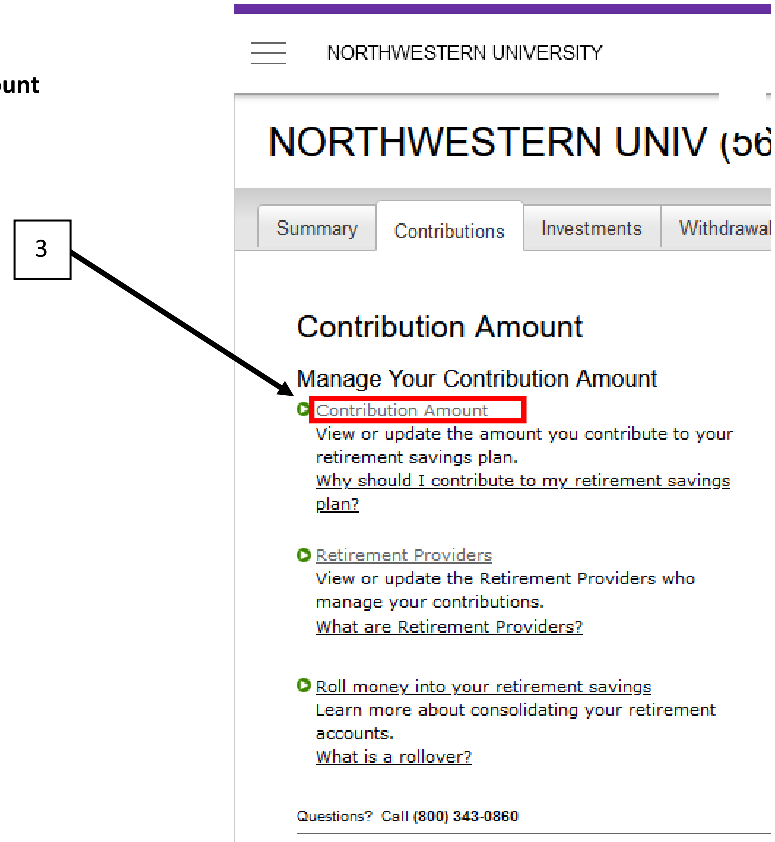
1. You will be directed to the savings plan administration page. Select **View Details** to see a breakdown of the Matched and Voluntary Savings Plans. If this is the first time you are logging in, you might be prompted to enter or create a Fidelity username and password.



2. To change your Matched or Voluntary deferrals, select any **Quick Links** tab under either Northwestern Univ (matched) or NU Voluntary. Then select **Contribution Amount**.



3. Then Select **Contribution Amount**

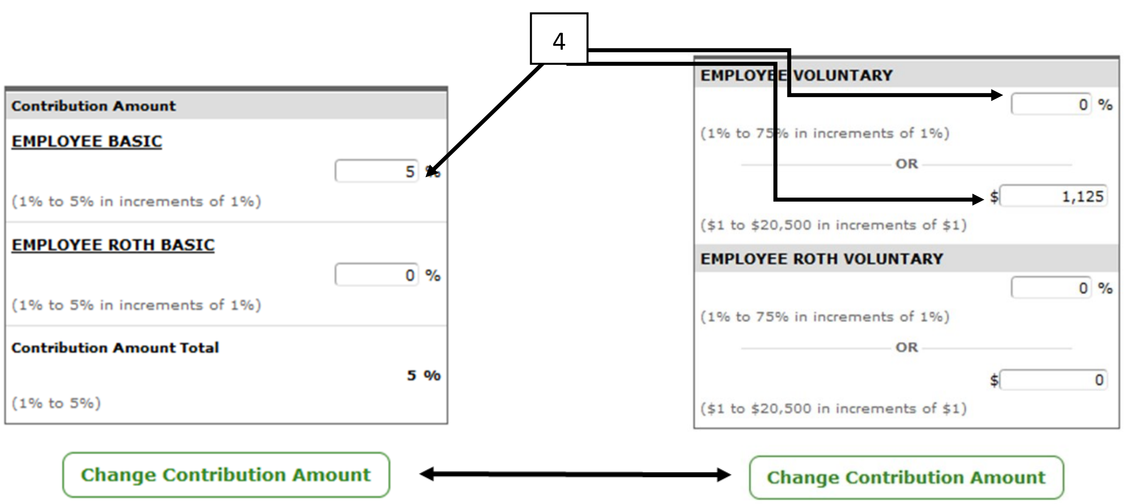


Contribution Change Effective Date

Changes to your deferrals will be applied to the next regularly scheduled payroll cycle, with some administrative delays. If the change to your deferral was made after the confirmation the the next payroll, then the change will be effective the following payroll cycle.

NOTE: You are only able to select a dollar amount for the Voluntary Plan once you have reached one year of service.

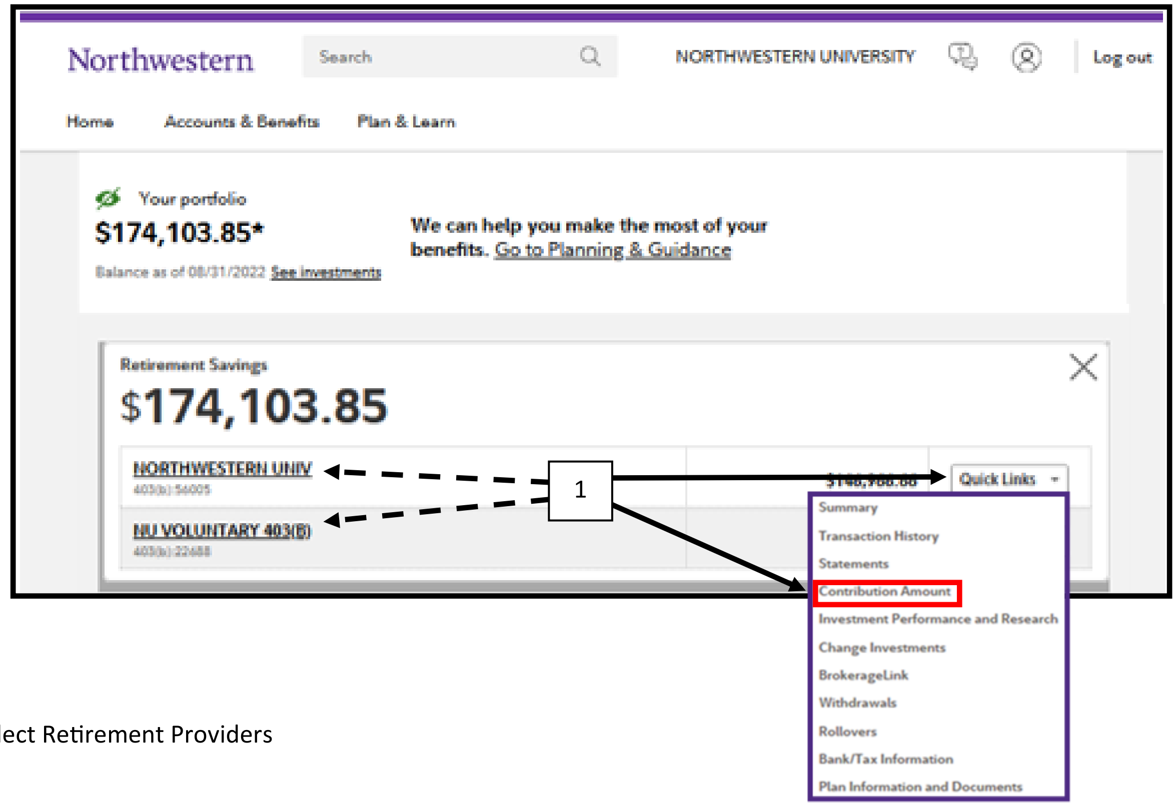
4. For the Matched plan, select a contribution between 1-5%. For the Voluntary plan, select a deferral between 1-70% or a dollar amount. Then select **Change Contribution Amount**. The change will be effective on the next possible pay period. Elections under Roth will be deducted after-tax.



Review/Update Retirement Providers

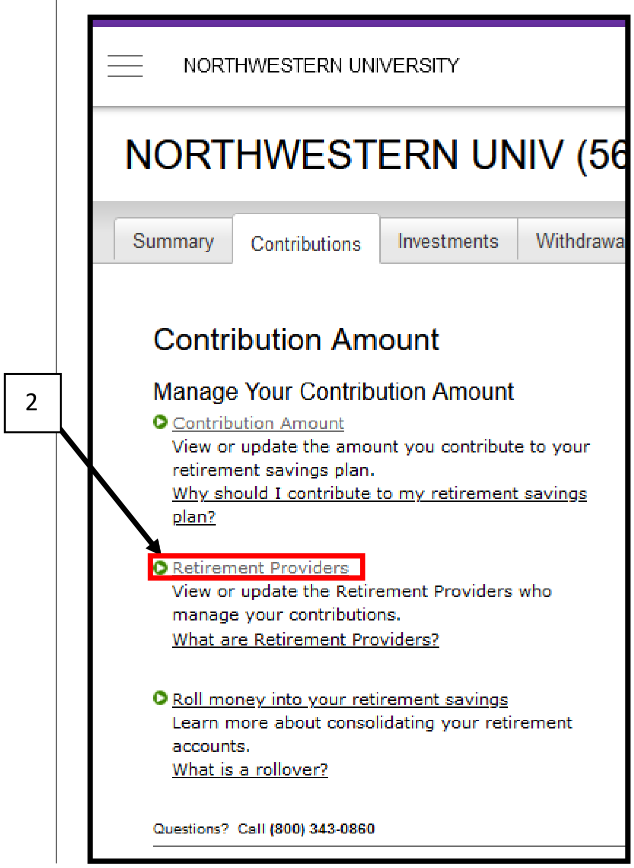
NOTE: The total amount indicated for your Retirement Savings account will not show the TIAA balance. The individual breakdowns do show the balance.

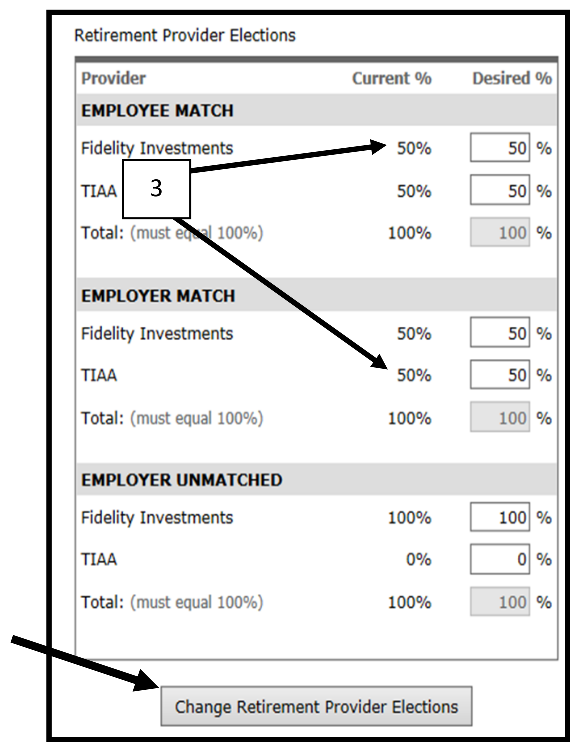
1. To change whether your funds are directed to Fidelity and/or TIAA, select any **Quick Links** tab under either Northwestern Univ (matched) or NU Voluntary. Then select **Contribution Amount**.



2. Select Retirement Providers

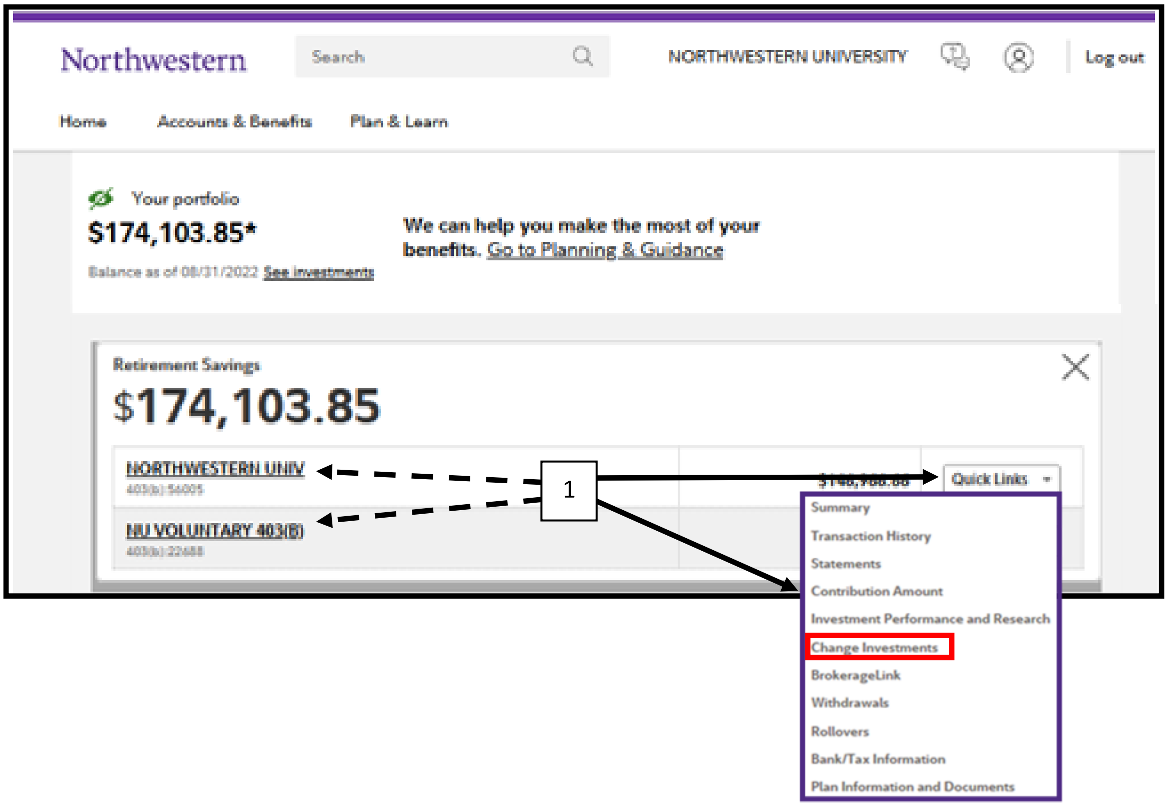
3. Select Percentage to Be Sent to Providers and Select **Change Retirement Provider Elections**





NOTE: The total amount indicated for your Retirement Savings account will not show the TIAA balance. The individual breakdowns do show the balance.

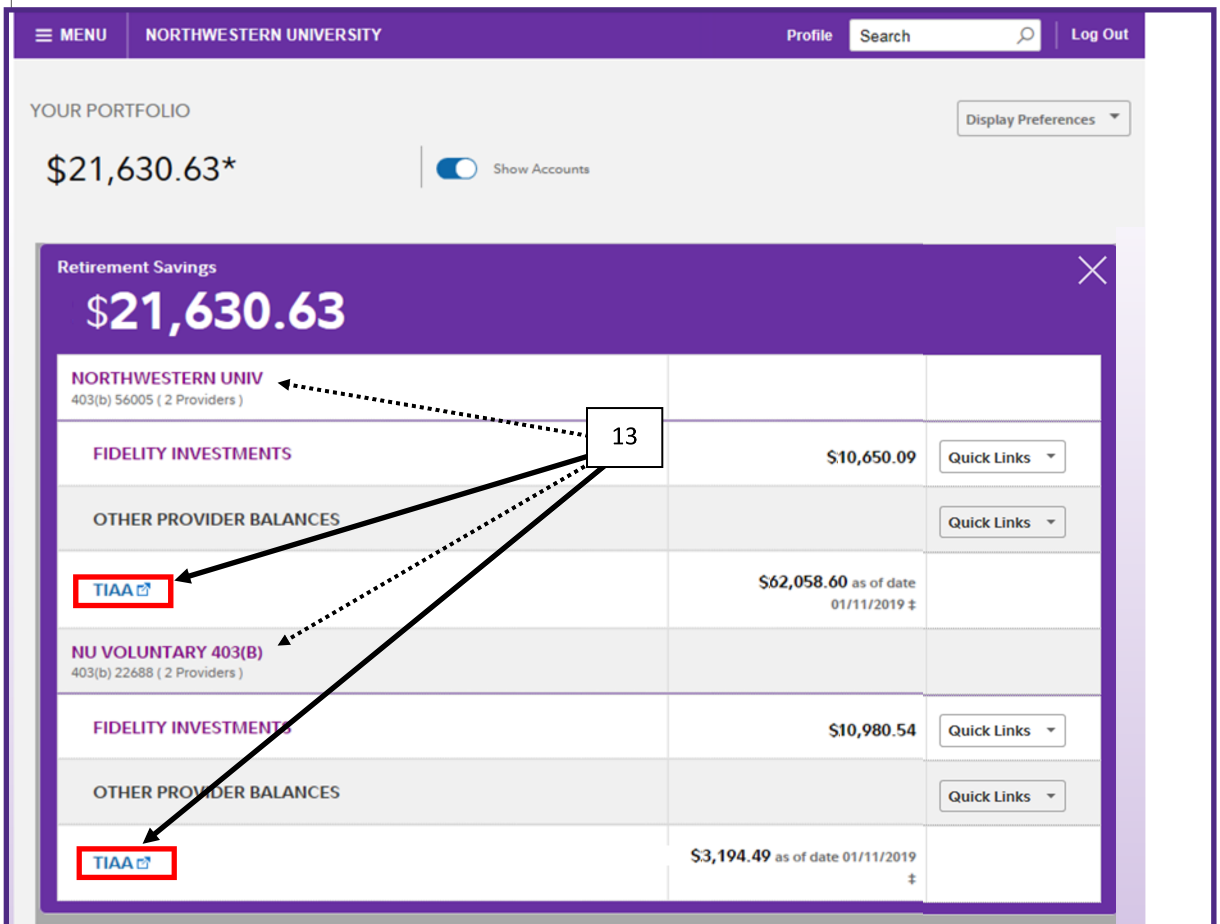
1. For **Fidelity** accounts, select **Quick Links** next to Fidelity under either Northwestern Univ (matched) or NU Voluntary. Then select **Change Investments**. Follow the prompts.



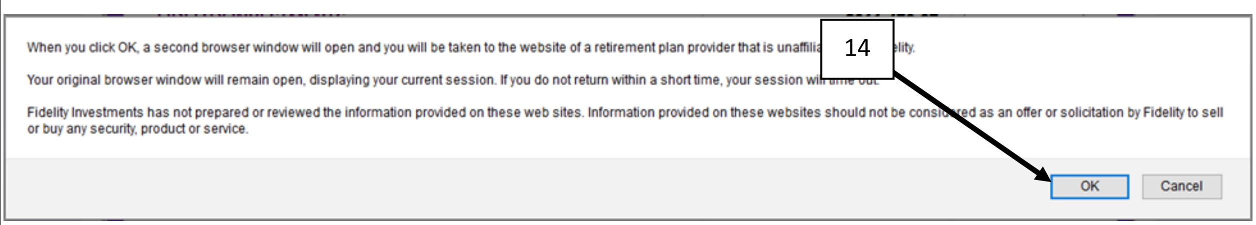
2. For **TIAA** accounts, navigate to www.tiaa.org and login with your username and password.

NOTE: The total amount indicated for your Retirement Savings account will not show the TIAA balance. The individual breakdowns do show the balance.

13. For **TIAA** accounts, select any **TIAA** under either Northwestern Univ (matched) or NU Voluntary.



14. You will then be prompted with a notice that you are being directed to TIAA's website, select **OK**.



15. Select **Log In** located in the upper right hand corner. Login using your TIAA user name and password. If you do not have an account with TIAA, select Register For Online Access.