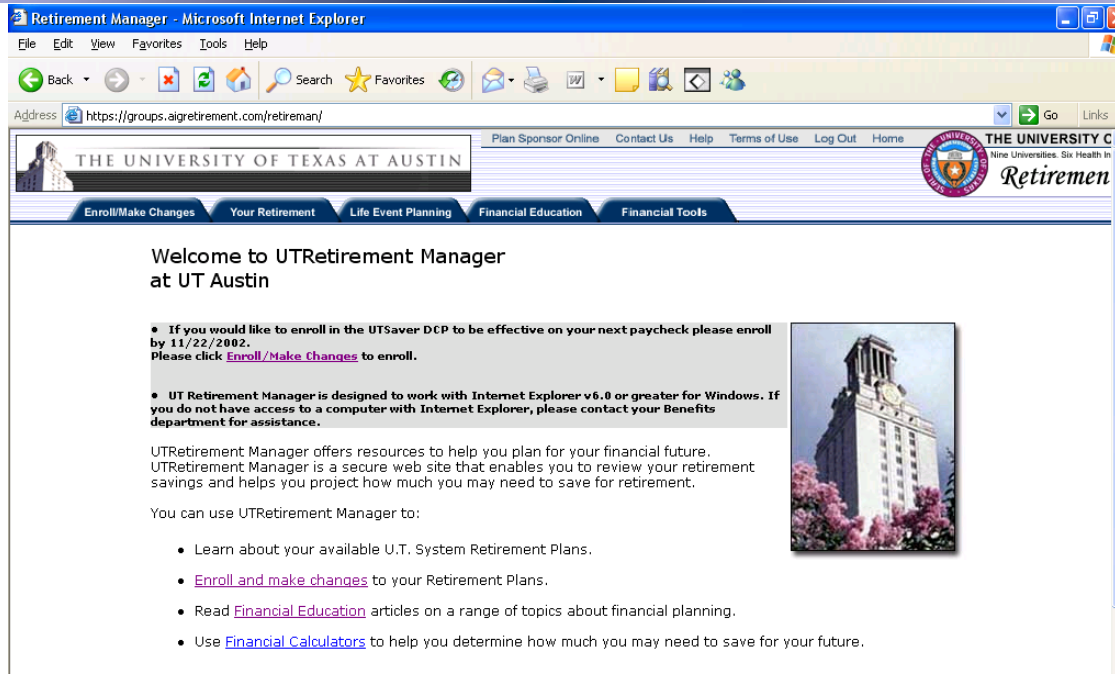**Welcome to UTRetirement Manager, your 24-hour Retirement Savings Tool. This presentation will assist you in logging into and taking full advantage of the UTRetirement Manager System.**

The University of Texas System
Retirement Manager
Your Future. Your Choice.

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Click on the Section you wish to view.

◆Section One: Logging On

◆Section Two: Optional Retirement Program Enrollment

◆Section Three: Enrolling in the UTSaver 403(b)

◆Section Four: Enrolling in the UTSaver 457(b)

◆Section Five: Other Tools

Welcome

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Retirement Manager - Microsoft Internet Explorer

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THE UNIVERSITY OF TEXAS AT AUSTIN

THE UNIVERSITY
Nine Universities. Six Health Institutions
Retiremen

Enroll/Make Changes | Your Retirement | Life Event Planning | Financial Education | Financial Tools

**Welcome to UTRetirement Manager
at UT Austin**

- If you would like to enroll in the UTSaver DCP to be effective on your next paycheck please enroll by 11/22/2002.
Please click **Enroll/Make Changes** to enroll.

- **UT Retirement Manager is designed to work with Internet Explorer v6.0 or greater for Windows. If you do not have access to a computer with Internet Explorer, please contact your Benefits department for assistance.**

UTRetirement Manager offers resources to help you plan for your financial future. UTRetirement Manager is a secure web site that enables you to review your retirement savings and helps you project how much you may need to save for retirement.

You can use UTRetirement Manager to:

- Learn about your available U.T. System Retirement Plans.
- Enroll and make changes to your Retirement Plans.
- Read Financial Education articles on a range of topics about financial planning.
- Use Financial Calculators to help you determine how much you may need to save for your future.
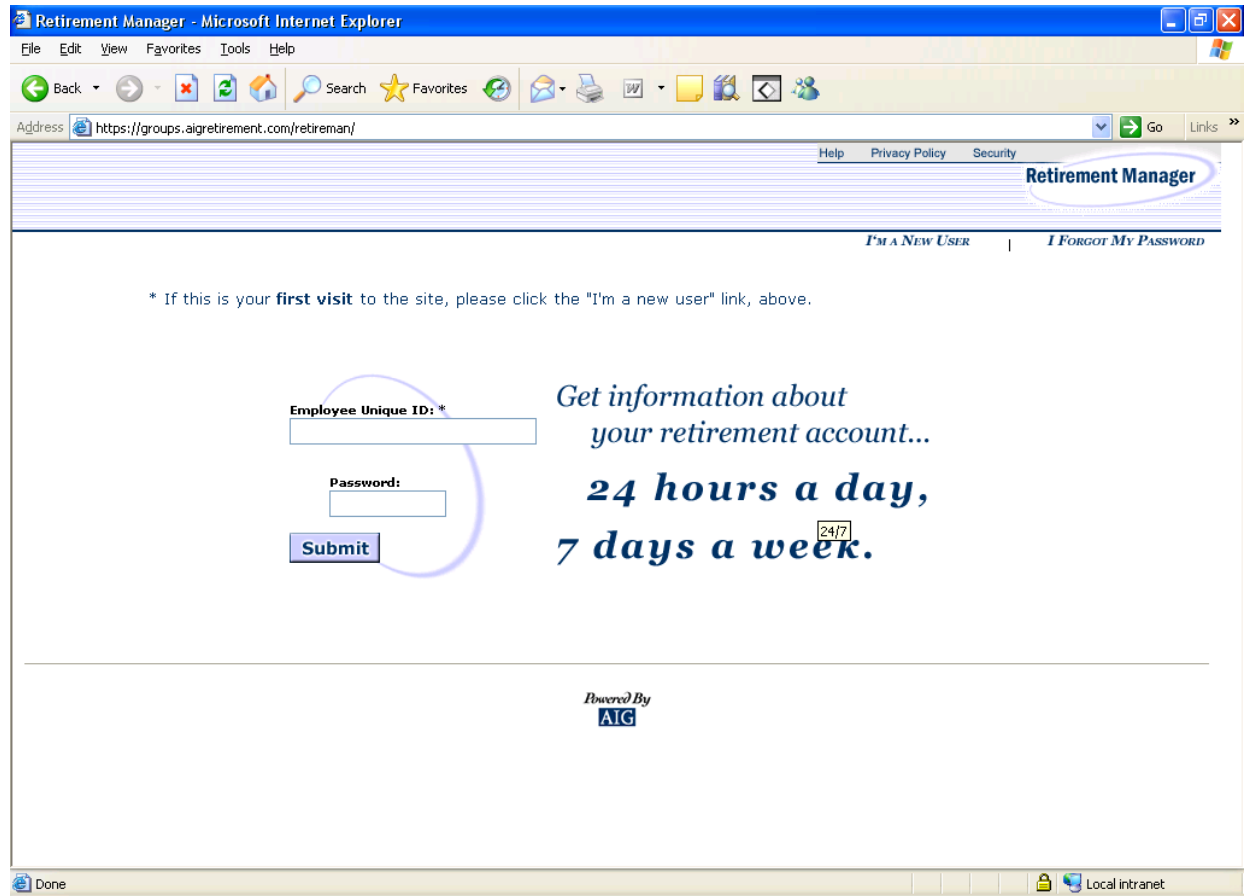
Retirement Manager is a secure web site that enables you to select the retirement plans you wish to contribute to, the provider(s), and the amount you wish to contribute to save for your future. UT Retirement Manager is designed to work with Internet Explorer v6.0 or greater for Windows. If you do not have access to a computer with Internet Exploder, please contact your Benefits department for assistance.

•**Learn about your U.T. System Retirement Program Plans.**

•**View a summary of your UTRetirement Plan balances.**

•**Enroll in and make changes to your UTRetirement Plans.**

•**Read Financial Education articles on a range of topics about financial planning and market volatility.**

•**Access Financial Calculators to help you determine how much of your salary you may need to save for your future.**

Logging On

If you have never used UTRetirement Manager, you will need to establish a password.

1) **On your first visit, click "I'm a new user".**

2) **If you have previously used UTRM but cannot remember your password, select "I Forgot My Password"**

Setting Up A Password

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After clicking "I'm a New User" complete the following fields:

1) **Last Name**

2) **Date of Birth**

3) **Employee Unique ID (If you are not sure what your "Employee Unique ID" is, go to http://www.utsystem.edu/benefits/retirement/enroll.htm**
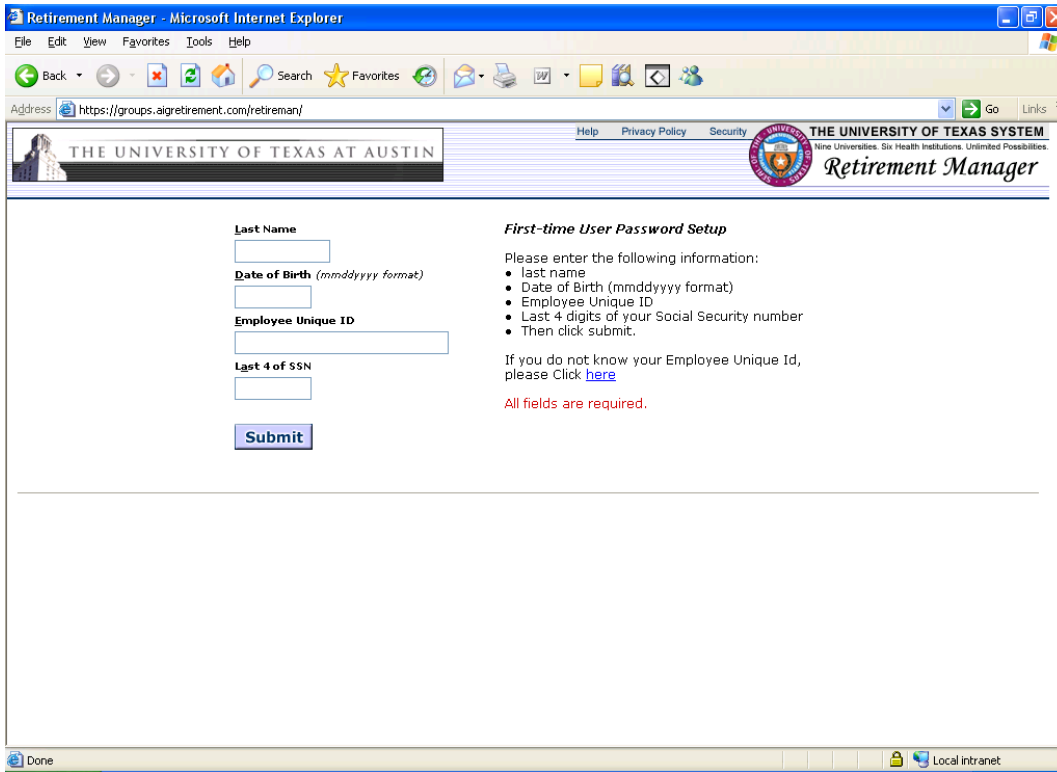
4) **Last four digits of your Social Security number.**

Establish a password. Passwords are CASE SENSITIVE and must:

1) **Be a combination of letters and at least one number**

2) **Between 8 and 12 characters.**

3) **Cannot begin or end with a number.**

4) **Must contain at least one upper case and one lower case letter.**

5) **Examples: Money4you, Retire2day**

Agreement

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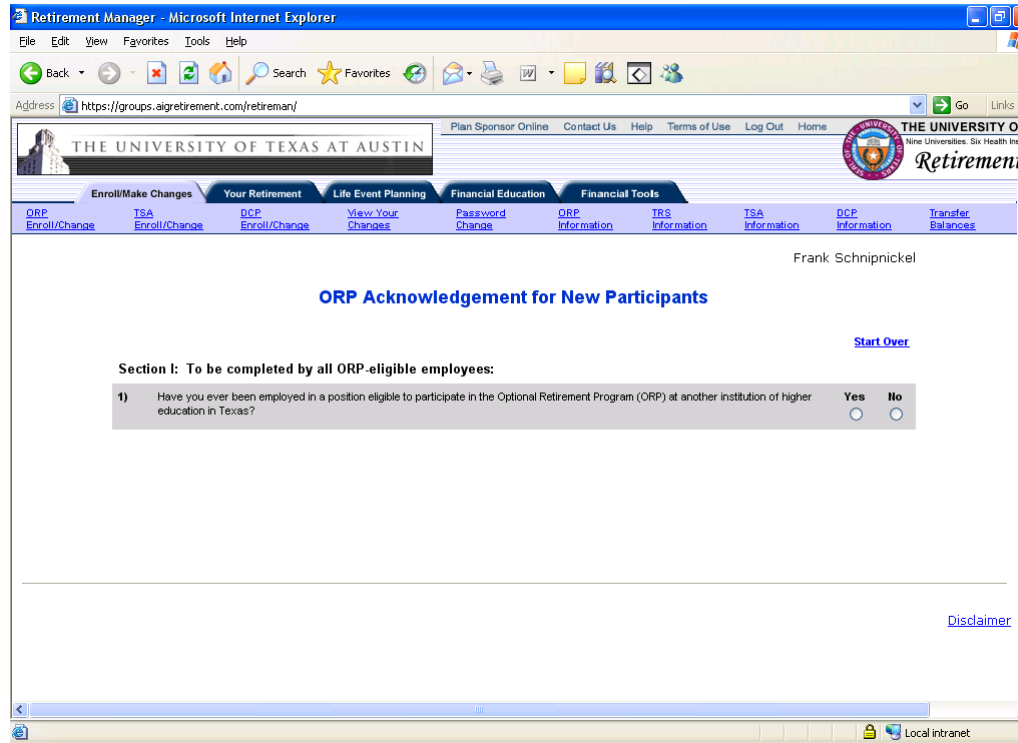**You must read and agree to the terms of use before UTRM access is granted**.

Each institution has a unique home page. Once at the home page, you can use the tabs at the top to enroll in or make changes to your retirement contributions, view account balances or access an array of useful articles and savings tools.
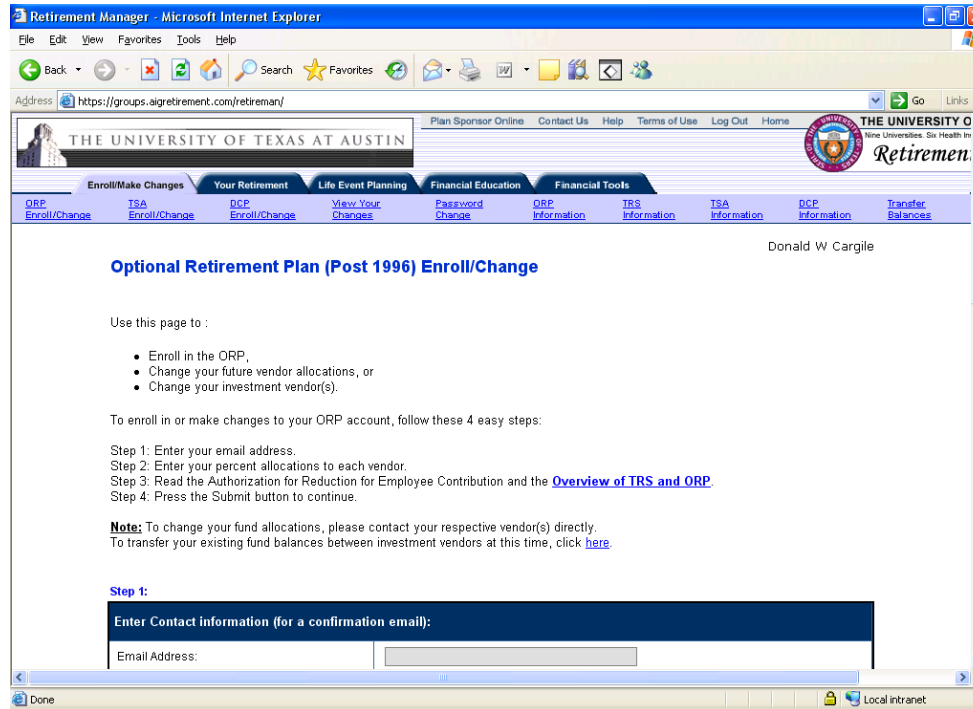
◆**Newly eligible ORP participants should select the Enroll/Make Change tab,**

◆**Once on the Enroll/Make Change page, select ORP Enroll/Change.**

Enrolling in ORP

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Before making provider selections, first complete the ORP Acknowledgment for New Participants.
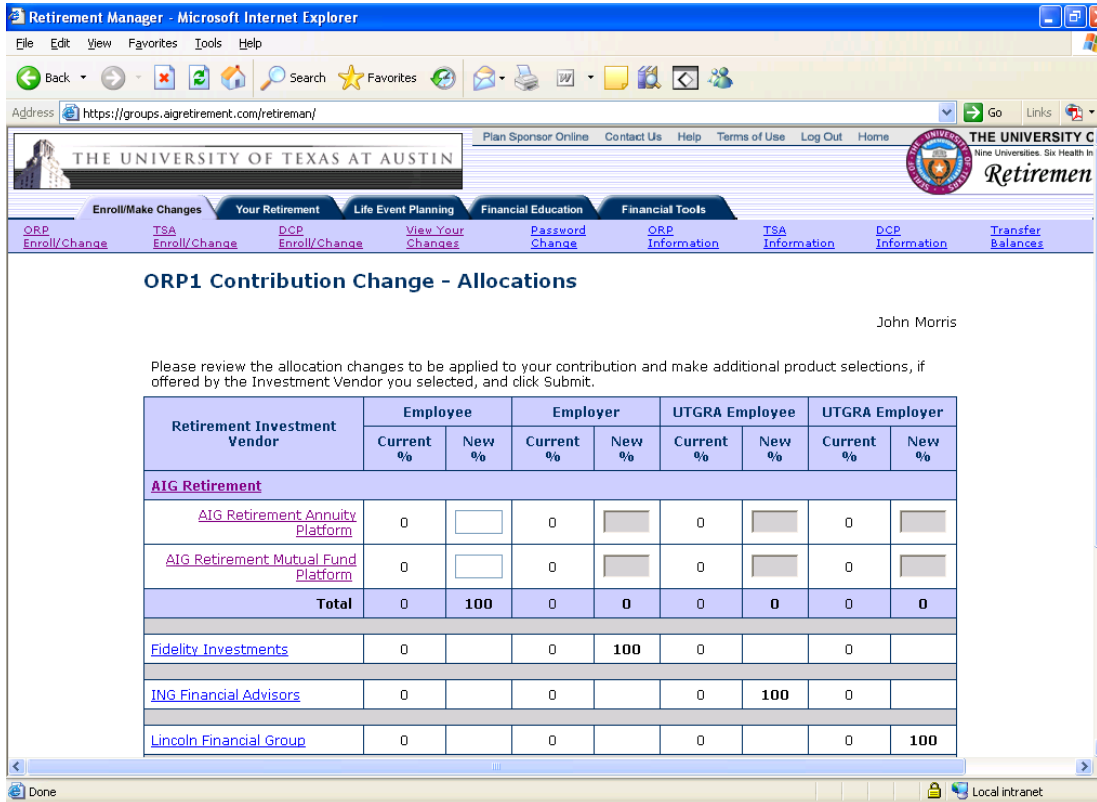
Note that only certain employees are eligible for ORP. You will see the ORP enrollment page only if you are in an eligible position. If you have any questions about ORP eligibility, please contact your local benefits office.

Enrolling in ORP

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Once you have completed your ORP acknowledgement questions, or if you are an existing ORP participant, use this screen to elect the retirement provider(s) to receive your contributions.

You will not select a contribution amount because the employee contribution is a fixed percentage established by state law.

While entering your changes, make sure to include your email address for the confirmation email that will be sent after you have successfully enrolled.

Enrolling in ORP

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Verify the provider(s) you selected and the percent chosen to go to each. The approved providers are:
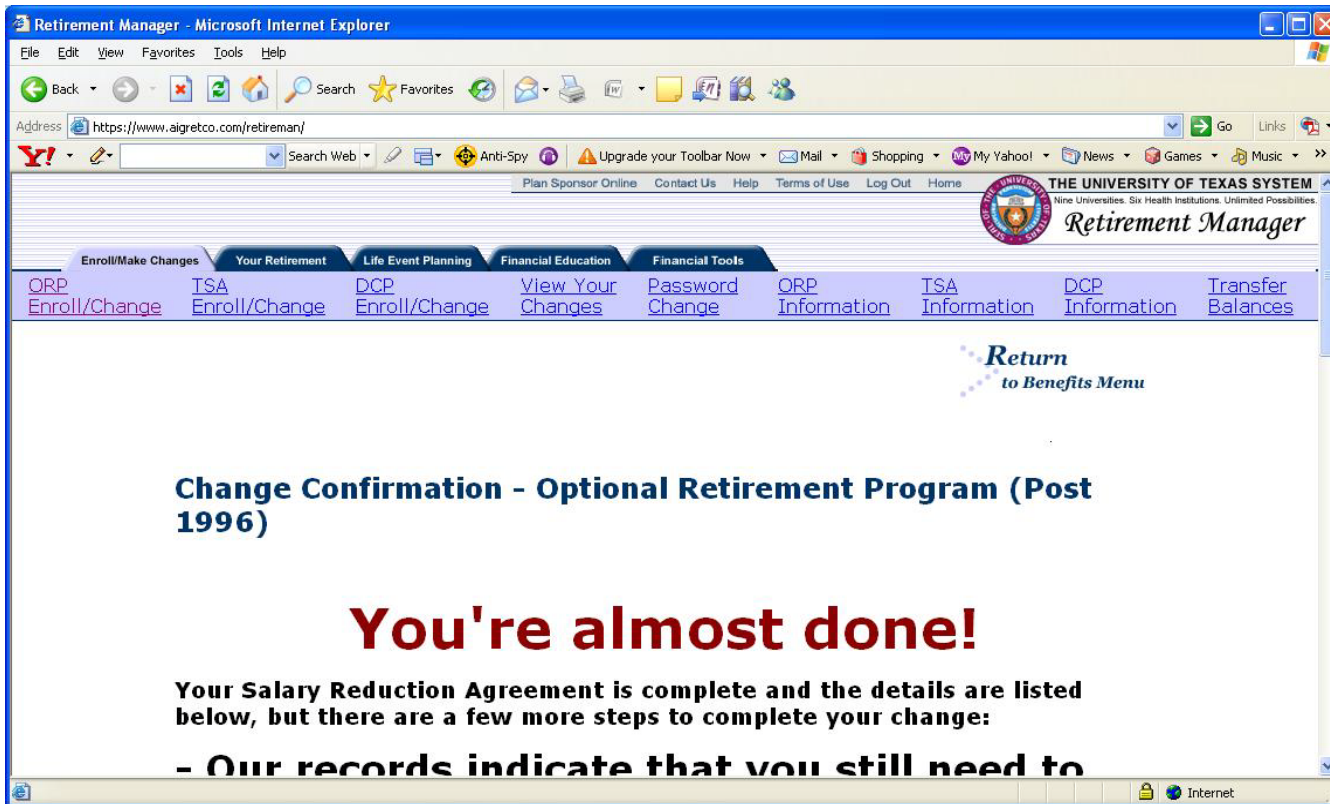
AIG Valic	**Lincoln Financial**
Fidelity Investments	**MetLife Resources**
ING	**TIAA-CREF**

Click the Submit button at the bottom of the screen.

After you press SUBMIT on the contribution change allocation screen you will receive a confirmation of the change.   Please note those only affects the choice of provider for your ORP contributions.

 If you have elected a new company or made a change, make sure that in addition to entering your elections on UTRetirement Manager that you also complete the enrollment form for your selected retirement provider(s). This final step is necessary to ensure the company invests your money according to your directions.

Salary Reduction Agreement Confirmation
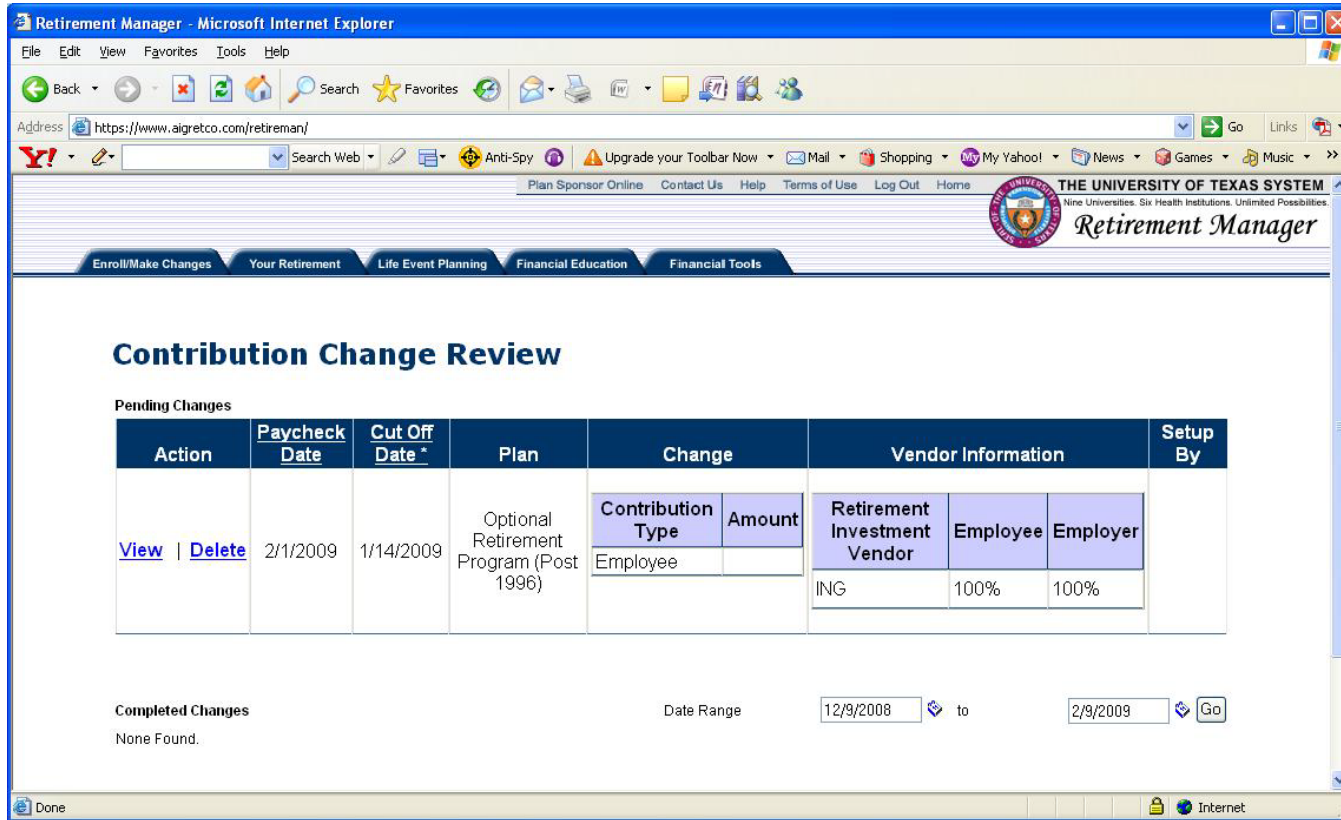
Your contribution change request has been received.

Your confirmation number is **513906.**

The change will be effective on your paycheck after 01/14/2009 and will remain in effect until you make another change.

The change details are:
Contributions will be divided among the following Vendors:

Percent Allocated to each Vendor		
Retirement Investment Vendor	Percent of Employee	Percent of Employer
ING	100	100

Print

If you do not receive confirmation of your change and a confirmation email, then it did not go through. This may be the case if you are using a McIntosh product, or Mozilla/Firefox as your browser, or if you do not have an accurate email listed on the enrollment page. If you do not receive a confirmation notice and the corresponding email, please try again using Internet Explorer 6 or above, and making sure to enter your email address.

You can see any changes you made by:

1) Returning to the Enroll/Make Change tab and
2) Selecting "View Your Changes"

Enrolling in ORP

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In the event you wish to make a correction to a change that has not yet become effective, it is necessary to delete the pending change request. To do this:
1) Go to the "View My Changes" option in the Enroll/Make Change Tab.
2) Under the "Action" box, click "Delete". This will delete the pending change.
3) If the change is no longer under Pending Changes, it has already been processed for that payroll period. However, you can return to the Enroll/Make Change tab and make a change for the next payroll period.

TSA Enroll/Make Changes

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The "Enroll/Make Changes" menu is where you select the retirement plan you wish to enroll in or make changes to an existing enrollment.

This page also allows you to view or delete pending enrollment selections, change your password, or link to information regarding your available retirement plans.

TSA Enroll/Make Changes

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The TSA Enroll/Change page allows you to
1) **Establish a new payroll deduction amount**
2) **Increase, lower or stop your contributions.**
3) **Select a provider(s) to receive your monthly contributions**

Please note that the maximum amount you may contribute to the TSA plan is established annually by the Internal Revenue Service. Contact your local benefits office for a calculation of the amount you can contribute because factors such as your mandatory retirement plan, your salary, your age, and your length of UT service will determine your maximum contribution amount.

TSA Enroll/Make Changes

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1) **When making selections on the enrollment page, first confirm your email address. This email is where confirmation of the change will be sent.**

2) **Next, review the paycheck date listed. The system automatically defaults to the next available payroll date. If you would like to select a different future paycheck date, select the new date from the drop down menu. For example, a check date of July 20th would represent the paycheck issued to you on or after July 20th.**

TSA Enroll/Make Changes

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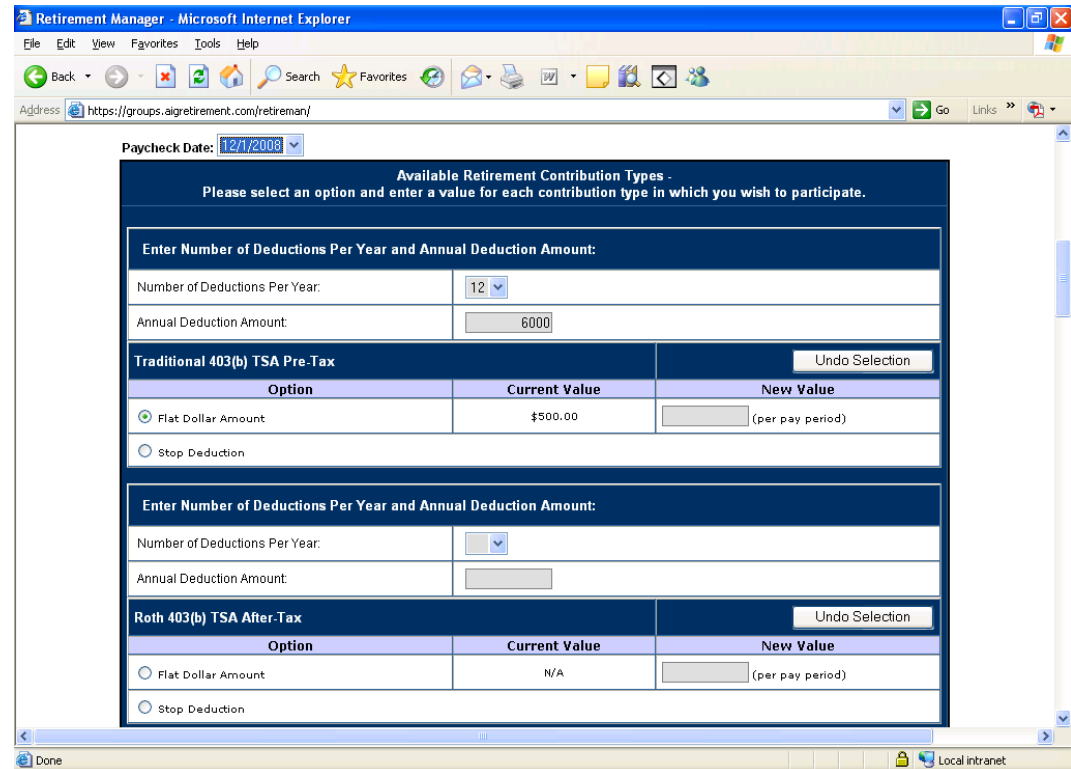**Before proceeding with your enrollment, you must decide:**

1) **if you wish to participate in the Traditional (before-tax) UTSaver 403(b) Tax Sheltered Annuity,**

2) **or the Roth (after tax) UTSaver 403(b) Tax Sheltered Annuity;**

3) **Or both the Traditional and Roth.**

Under the program desired:

1) **Select the number of deductions per year (may not pertain to certain academic institutions) and the annual deduction.**

2) **Elect the flat dollar amount you wish to have deducted from your check each pay period.**

Note: To stop your contributions, select the "stop deduction" button

3) **Scroll down and elect which provider(s) will receive your contributions and what percentage of your contributions will go to each provider(s).**

4) **Click the "Submit" button on the bottom of the screen.**

TSA Enroll/Make Changes

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Verify the provider(s) you selected and the percent chosen to go to each.

Click the Submit button at the bottom of the screen.

DCP Enroll/Make Change

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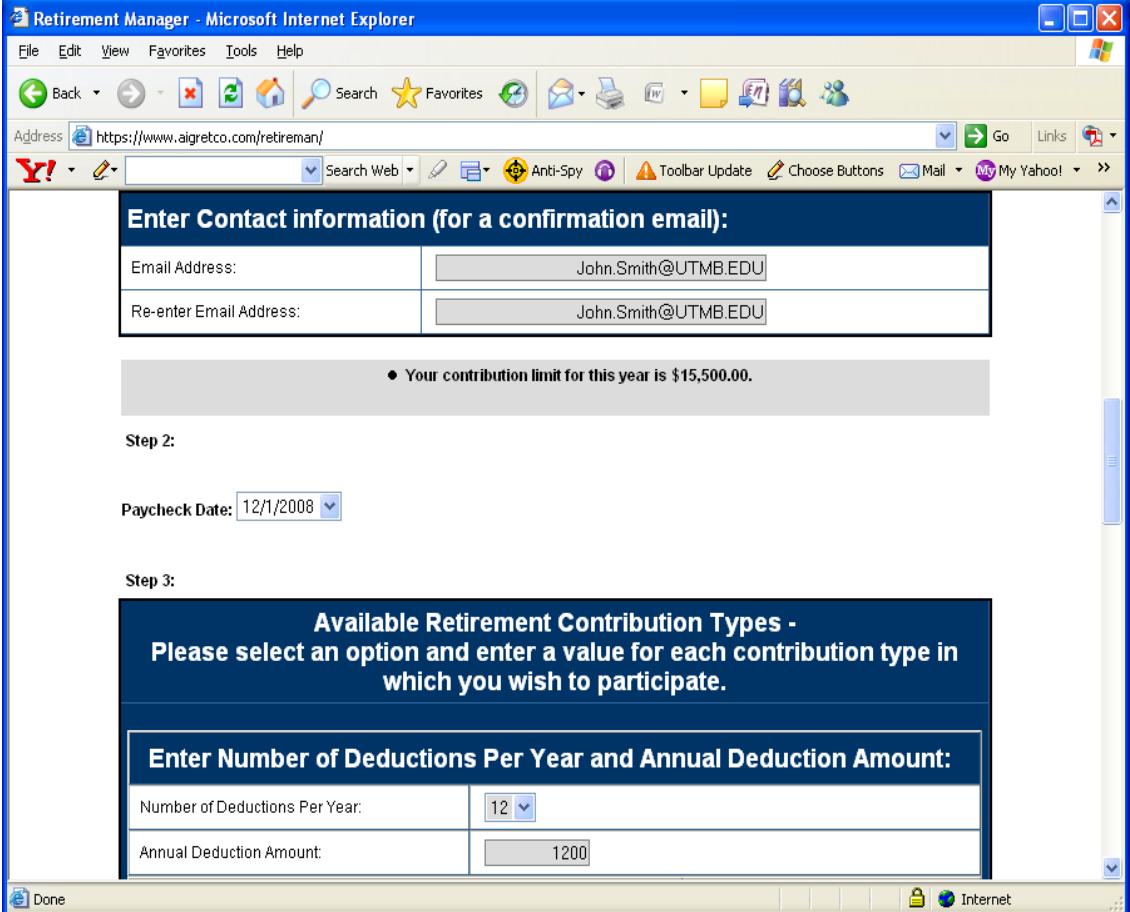
The DCP Enroll/Change page allows you to:

1) **Set up a new payroll deduction amount**

2) **Increase, lower or stop your contributions**

3) **Select a provider(s) to receive your monthly contributions**.

Under the program desired:

1) **Select the number of deductions per year (may not pertain to certain academic institutions) and the annual deduction.**

2) **Elect the flat dollar amount you wish to have deducted from your check each pay period.**

Note: To stop your contributions, select the "stop deduction" button

3) **Scroll down and elect which provider(s) will receive your contributions and what percentage of your contributions will go to each provider(s).**

4) **Click the "Submit" button on the bottom of the screen.**
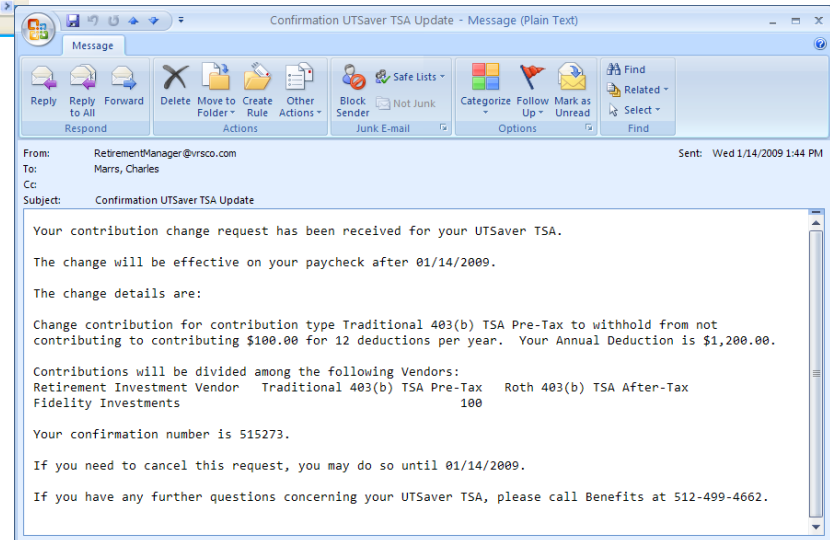
1) Verify the provider(s) you selected and the percent chosen to go to each.

2) Click the Submit button at the bottom of the screen.
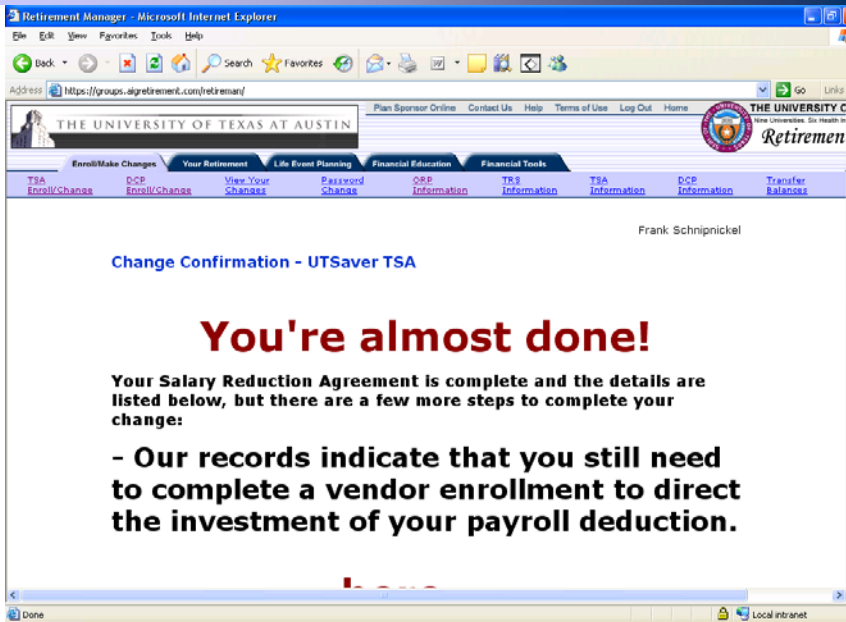
DCP Enroll/Make Change

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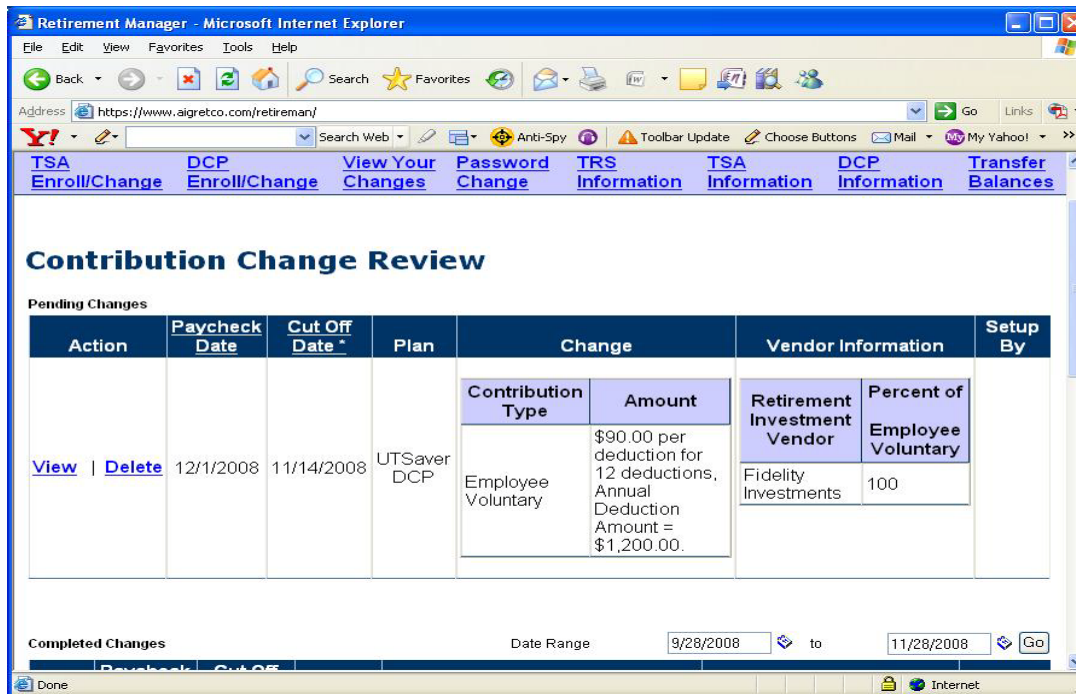Your Future. Your Choice.

If you have elected a new company or made a change, make sure that in addition to entering your elections on UTRetirement Manager that you also complete the enrollment form for your selected retirement provider(s). This final step is necessary to ensure the company invests your money according to your directions.

If you do not receive confirmation of your change and a confirmation email, then it did not go through. This may be the case if you are using a McIntosh product, or Mozilla/Firefox as your browser, or if you do not have an accurate email listed on the enrollment page. If you do not receive a confirmation notice and the corresponding email, please try again using Internet Explorer 6 or above, and making sure to enter your email address
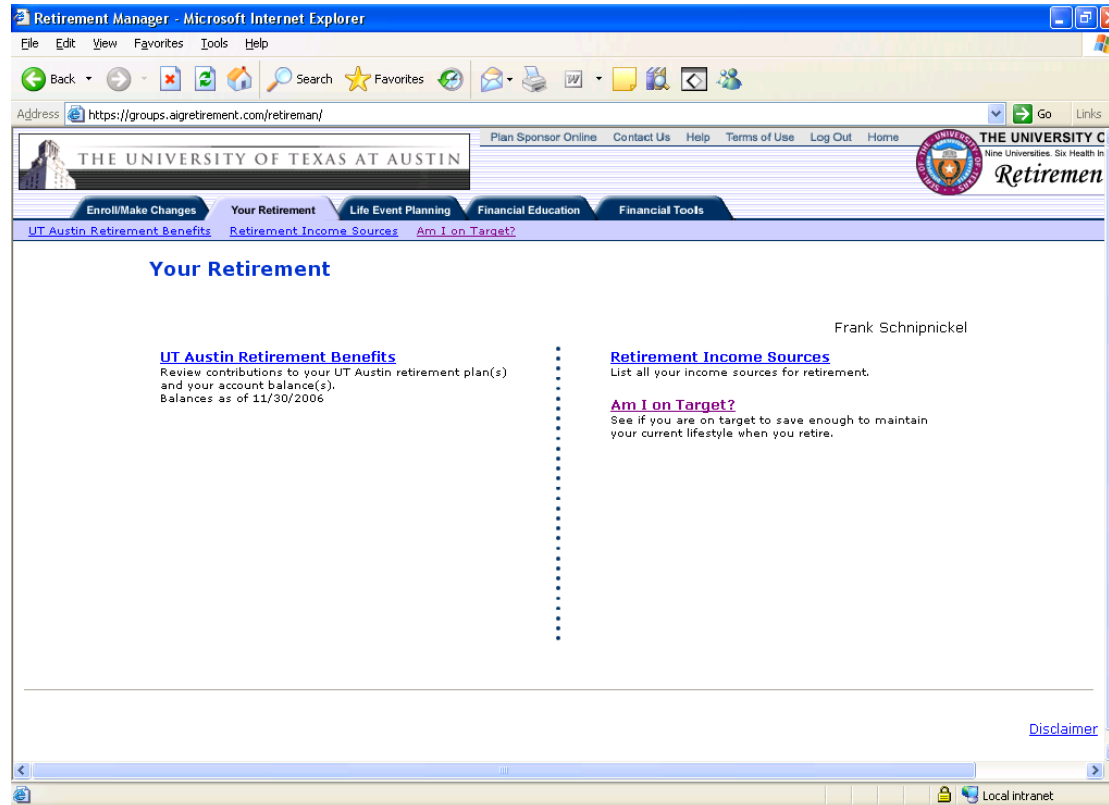

Change Confirmation - UTSaver TSA

Frank Schnipnickel

You're almost done!

Your Salary Reduction Agreement is complete and the details are listed below, but there are a few more steps to complete your change:

- Our records indicate that you still need to complete a vendor enrollment to direct the investment of your payroll deduction.

Confirmation UTSaver TSA Update - Message (Plain Text)

From: RetirementManager@vrsco.com
To: Marrs, Charles
Cc:
Subject: Confirmation UTSaver TSA Update
Sent: Wed 1/14/2009 1:44 PM

Your contribution change request has been received for your UTSaver TSA.

The change will be effective on your paycheck after 01/14/2009.

The change details are:

Change contribution for contribution type Traditional 403(b) TSA Pre-Tax to withhold from not contributing to contributing $100.00 for 12 deductions per year. Your Annual Deduction is $1,200.00.

Contributions will be divided among the following Vendors:
Retirement Investment Vendor   Traditional 403(b) TSA Pre-Tax   Roth 403(b) TSA After-Tax
Fidelity Investments   100

Your confirmation number is 515273.

If you need to cancel this request, you may do so until 01/14/2009.

If you have any further questions concerning your UTSaver TSA, please call Benefits at 512-499-4662.

In the event you wish to make a correction to a change that has not yet become effective, it is necessary to delete the pending change request. To do this:

1) Go to the "View My Changes" option in the Enroll/Make Change Tab.
2) Under the "Action" box, click "Delete". This will delete the pending change.
3) If the change is no longer under Pending Changes, it has already been processed for that payroll period. However, you can return to the Enroll/Make Change tab and make a change for the next payroll period.

•**Other Tools:**

•**Checking Your Balances**

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"**Your Retirement" tab displays a link to your UT System Retirement contributions and account balances, and links to a financial calculator.**

Other Tools:

Checking Your Balances

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UT Retirement Benefits Page displays your contribution amounts and account balances with the currently authorized UT Retirement Program Providers. This information is updated monthly.

Other Tools:

Retirement Income Calculator

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The "Retirement Income Sources" page is a calculator. UT Retirement Manager calculates balances based on the age in the formula and current contributions to the Optional Retirement Program and/or any voluntary retirement accounts. To change the default estimates; enter other sources of retirement income, or to change any other numbers, click on "Reset" at the bottom of the page.

The calculator assumes replacement of 75% of your current income in retirement and an 5% return on your investments.

Other Tools:

Retirement Savings Calculator

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"Am I on Target" is another planning tool. It displays the results of the combinations of money sources from the "Retirement Income Sources" page. It compares the projected monthly income at retirement against the amount needed to sustain at least 75% of your current income.

You can use this information to adjust your monthly contribution amounts to your voluntary UTSaver TSA or UTSaver DCP.

Other Tools:

Useful Articles

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UTRetirement Manager is not limited to just enrolling and changing your deduction amounts or viewing your account balances. There are many valuable financial tools and articles that can be helpful in planning your retirement.

As you exit UTRretirement Manager, please complete the survey and give us your feedback.

Your Local Benefits office

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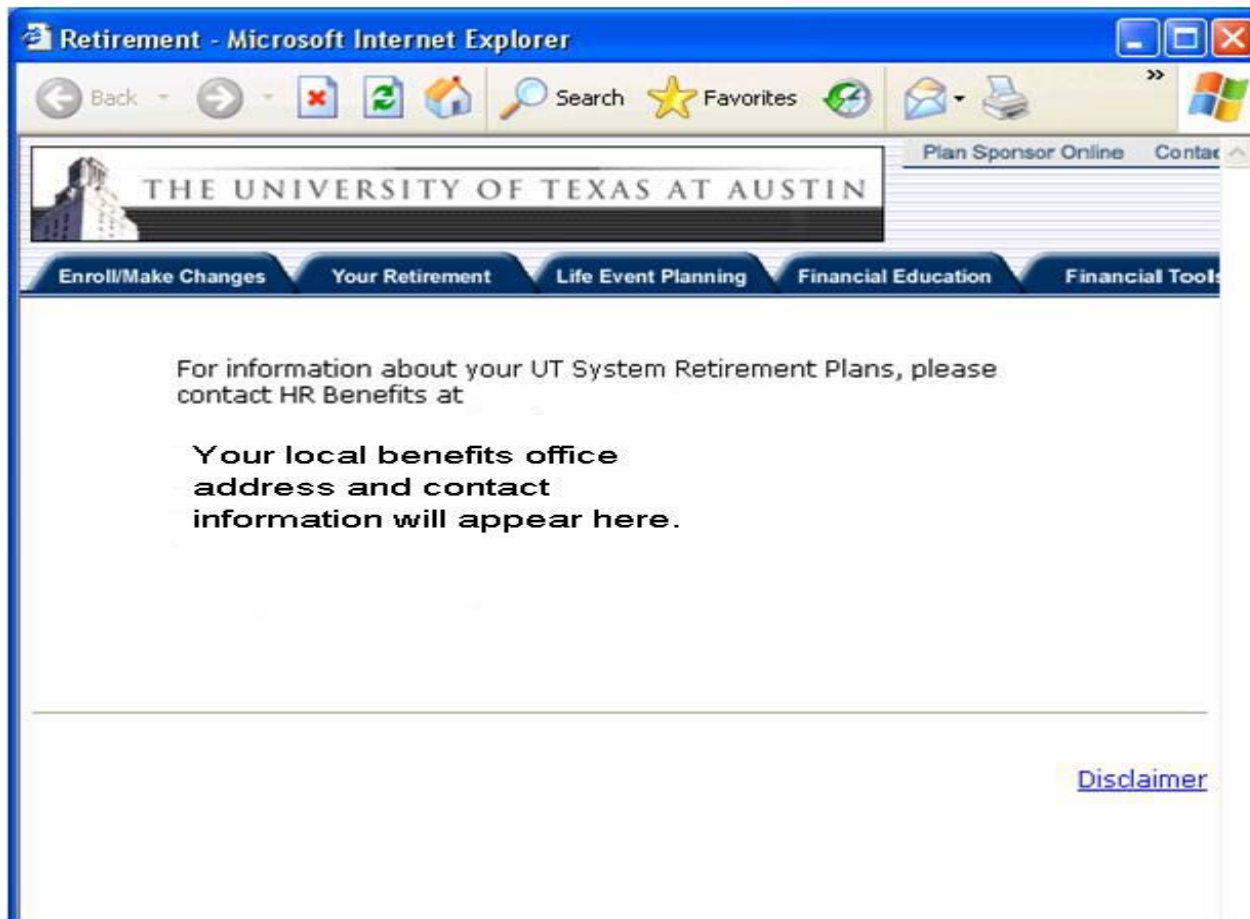
If you have questions the UTRetirement Programs or enrolling in a plan, you may contact your local benefits office or the UT System Office of Employee Benefits.