How to Access and Manage Your Santa Clara University Retirement Plan Accounts Online with NetBenefits®

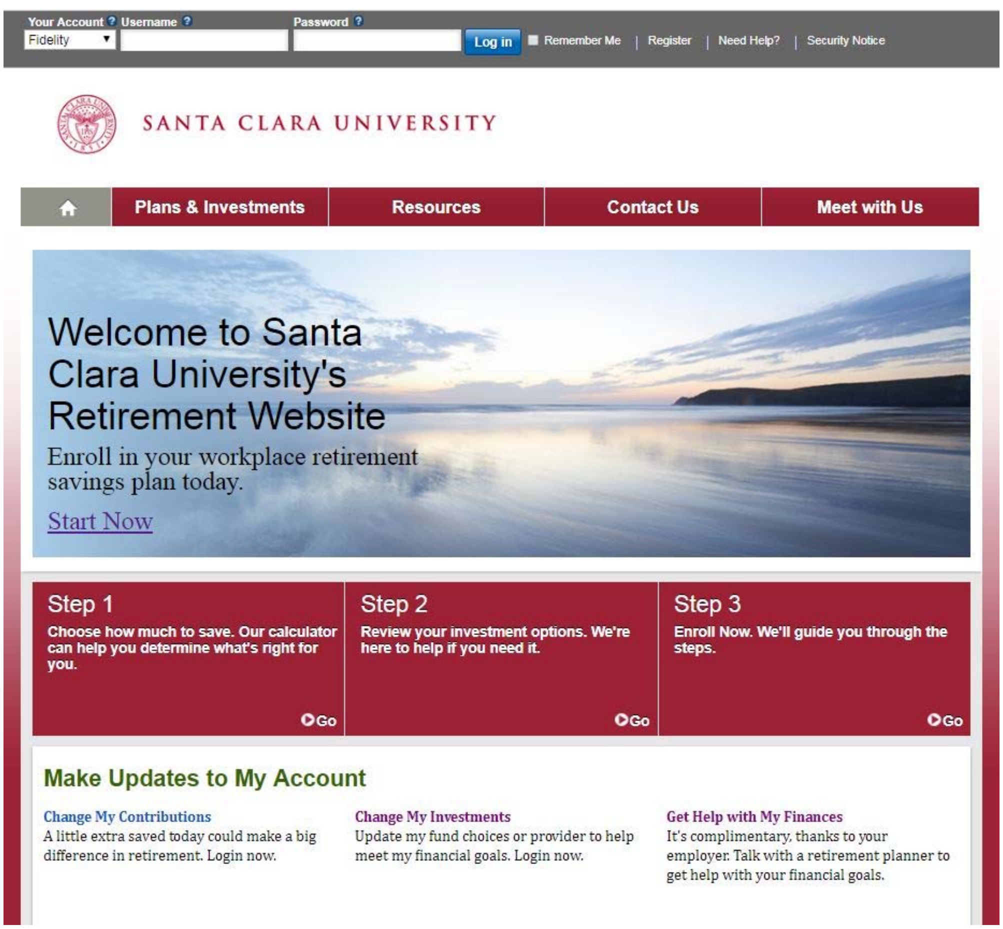
SANTA CLARA UNIVERSITY

How to Access and Manage Your Santa Clara University (SCU) Retirement Plan Accounts Online

Your SCU Retirement Plans are important benefits, so you need the right information, resources, and support to help you make decisions with confidence.

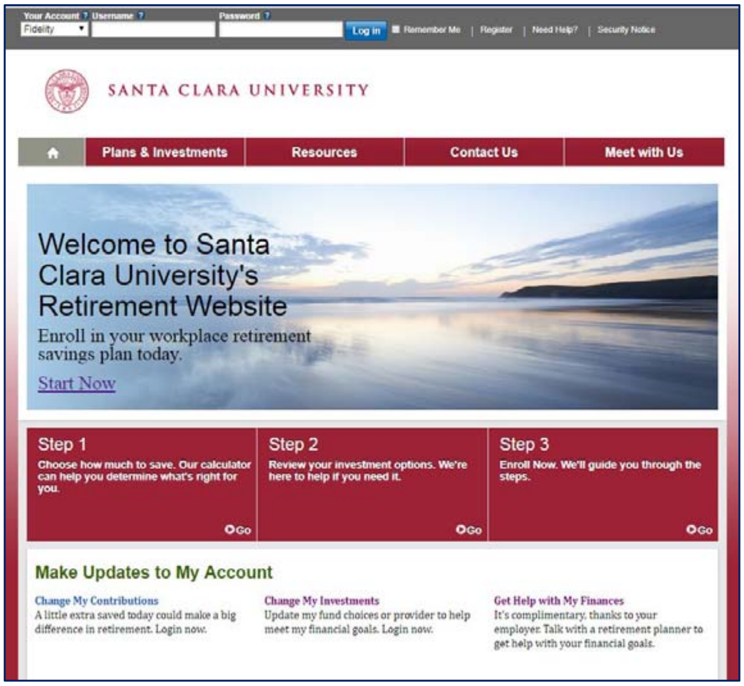
You can visit the website at www.netbenefits.com/scu to view plan details, access tools and calculators, and log on to your NetBenefits® account to make updates. You can also call the Fidelity Retirement Service Center at 800-343-0860.

All active and eligible employees and plan participants may log on to NetBenefits at any time. NetBenefits is where you will enroll, make retirement provider elections, and make changes to your deferral election.



How to Log On to Your NetBenefits Account

- *Log on* to your NetBenefits account at www.netbenefits.com/scu.



- If you are a current Fidelity customer or already have a NetBenefits username and password, you can continue to use them to log on to your NetBenefits account.

- At the top of the home page, enter your NetBenefits username and password. Click *Log in*.

- If you *have not* previously set up a NetBenefits username and password, you will need to register to create a username and password in order to access your NetBenefits account.

    - Click *Register* at the top of the home page, and follow the prompts to establish a username and password.

- If you are a current Fidelity customer or *already have* a NetBenefits username and password, but you have forgotten your NetBenefits username and/or password, you will need to reset your username and password in order to access your NetBenefits account.

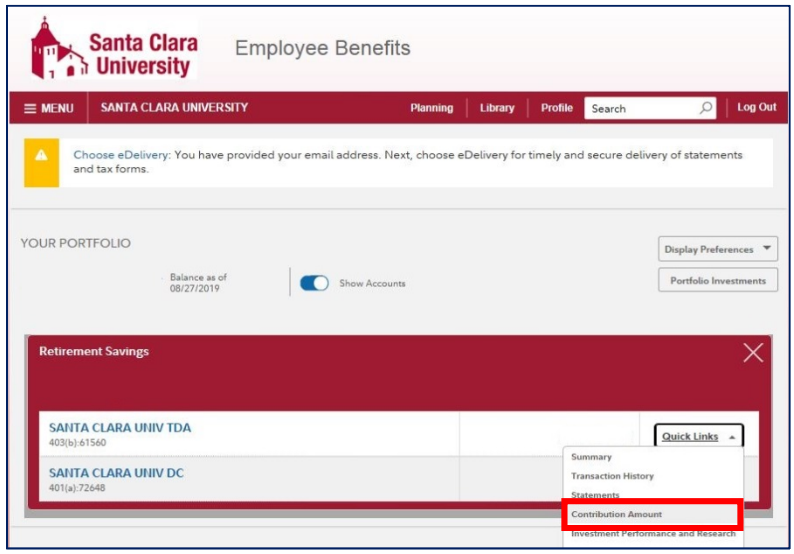
    - Click *Need Help?* at the top of the home page, and follow the prompts to reset your username or password.

- When you log on to NetBenefits, you'll be asked to provide your email address, email preferences, and mobile phone number (optional).

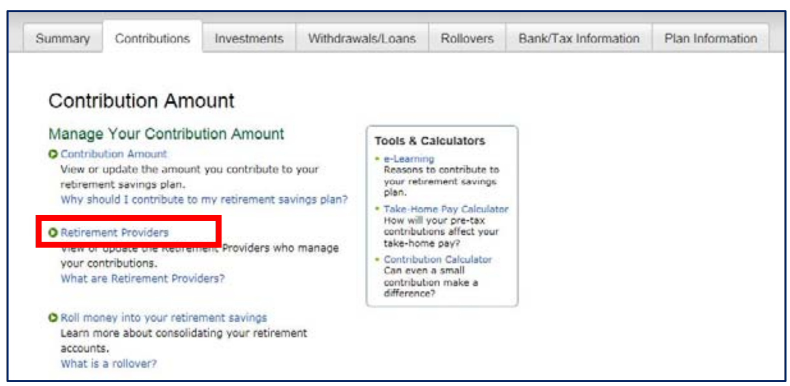
How to Change Your Retirement Provider

If you are **currently participating** in the SCU Retirement Plans, you can change where your contributions are directed online on NetBenefits:

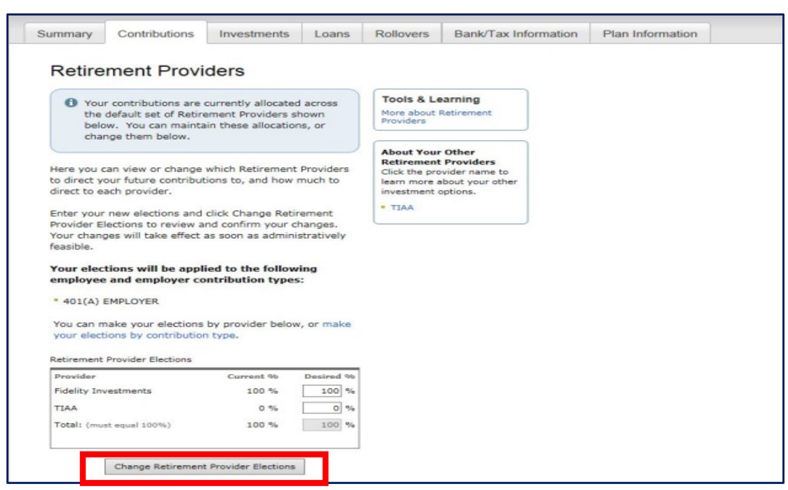
- *Log on* to your NetBenefits account at www.netbenefits.com/scu.
- From the home page, click the *Quick Links* drop-down menu next to the plan name for which you want to change the retirement provider and select *Contribution Amount*.



- Click on the *Retirement Providers* link.



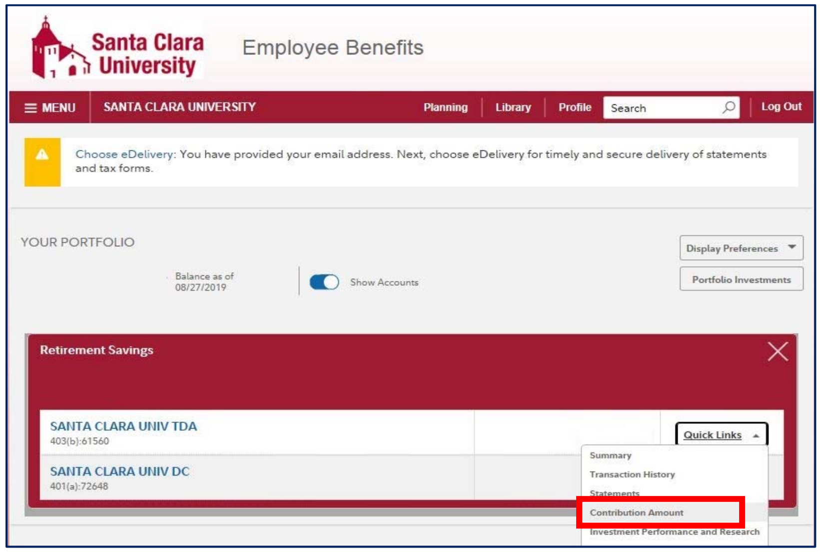
- Follow the screens to change your retirement provider.
- *Review and Submit* your retirement provier changes and follow the *Next Steps*.



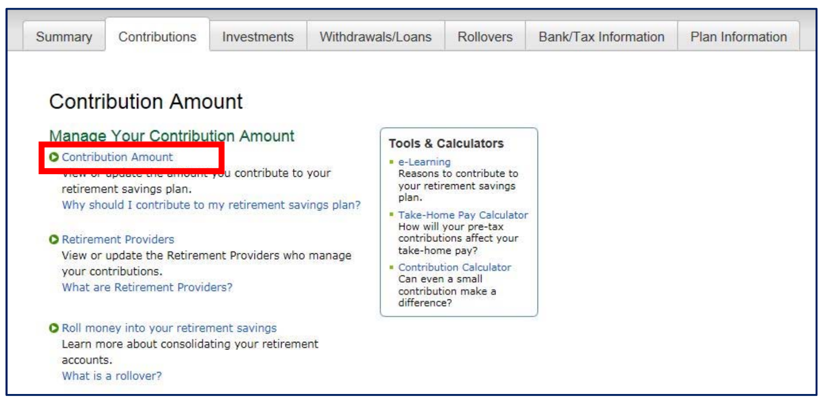
How to Change Your SCU 403(b) Deferral Amount

If you are **currently contributing** to the SCU 403(b) Retirement Plan, you can change your deferral amount online on NetBenefits:

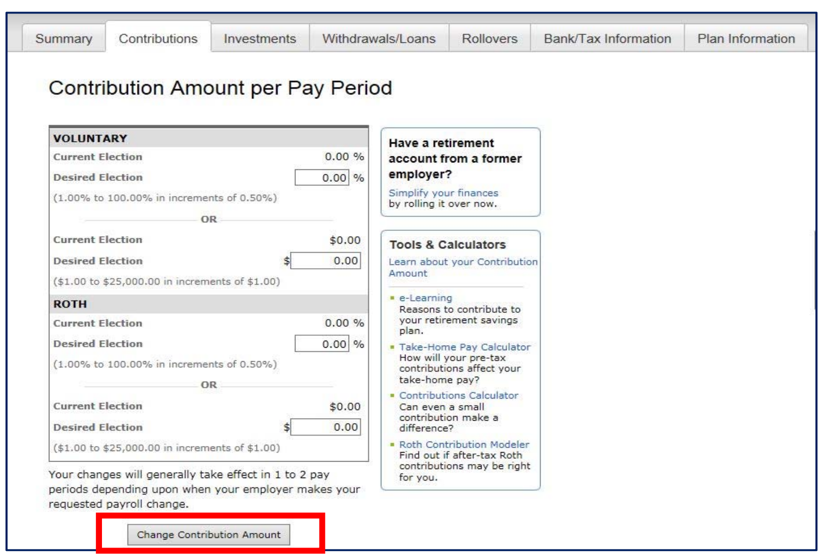
- *Log on* to your NetBenefits account at www.netbenefits.com/scu.
- From the home page, click the *Quick Links* drop-down menu next to the plan name you want to change the retirement provider, select *Contribution Amount*.



- Click on the *Contribution Amount* link.

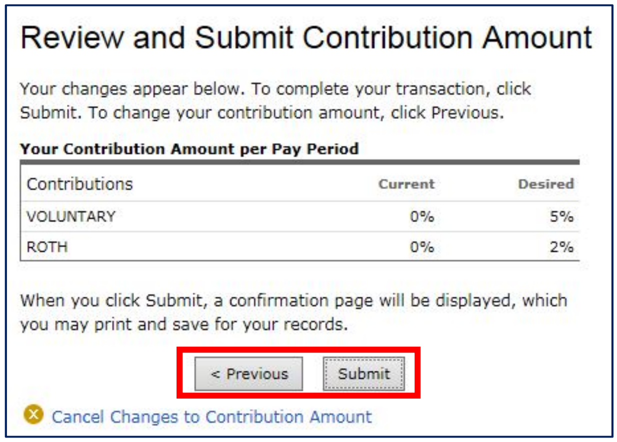


- Enter the desired election amount. Click *Change Contribution Amount*.



How to Change Your SCU 403(b) Deferral Amount, continued

- *Review and Submit* the change. Click *Submit*.



Review and Submit Contribution Amount

Your changes appear below. To complete your transaction, click Submit. To change your contribution amount, click Previous.

Your Contribution Amount per Pay Period

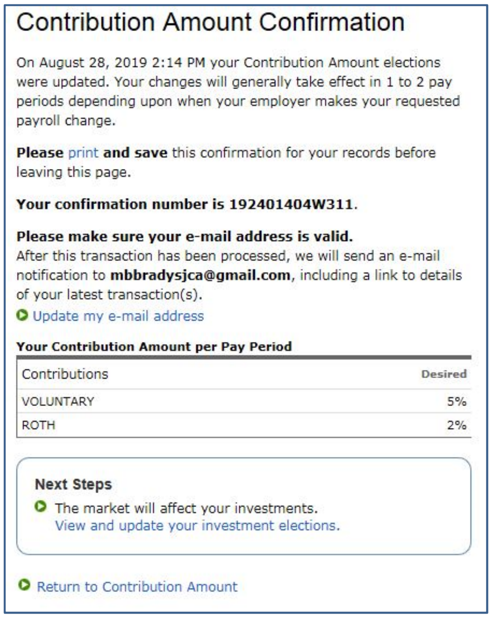
Contributions	Current	Desired
VOLUNTARY	0%	5%
ROTH	0%	2%

When you click Submit, a confirmation page will be displayed, which you may print and save for your records.

< Previous Submit

Cancel Changes to Contribution Amount

- *Contribution Amount Confirmation* will appear for you to print for your records.



Contribution Amount Confirmation

On August 28, 2019 2:14 PM your Contribution Amount elections were updated. Your changes will generally take effect in 1 to 2 pay periods depending upon when your employer makes your requested payroll change.

Please print **and save** this confirmation for your records before leaving this page.

Your confirmation number is 192401404W311.

Please make sure your e-mail address is valid.
After this transaction has been processed, we will send an e-mail notification to **mbbradysjca@gmail.com**, including a link to details of your latest transaction(s).

Update my e-mail address

Your Contribution Amount per Pay Period

Contributions	Desired
VOLUNTARY	5%
ROTH	2%

Next Steps

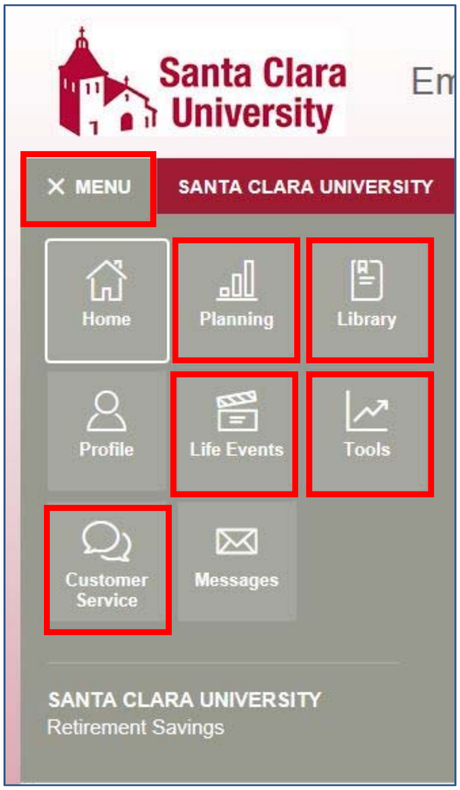
The market will affect your investments.
View and update your investment elections.

Return to Contribution Amount

How to Access NetBenefits Tools and Resources

Take time to make sure your investment strategy is on track. You can access practical education, easy-to-use tools, and Fidelity's innovative resources and insights to help you make informed decisions.

- Log on to your account at www.netbenefits.com/scu.
- Determine which tool you want to use from the *Menu* tab:
  - Select the *Planning* icon to access the Planning & Guidance Center. Here is where you can get help identifying an asset mix that aligns with your goals.
  - Select the *Library* icon to browse featured articles, infographics, videos, and financial learning resources that suit your interests and needs.
  - Select the *Tools* icon to view the tools and calculators. Here is where you will find a variety of calculators and modeling tools geared to saving and spending. You can also access Full View® to easily monitor all your Fidelity and non-Fidelity online financial accounts in one secure place.
  - Select the *Life Events* icon for some key steps, tools, and insight when changes in life occur.
  - Select the *Customer Service* icon to view phone numbers and communications.



Go Mobile App

- *Download the NetBenefits® Mobile App* to check balances and account performance, select investment options, or change balances among investments and more!

Need Help?

Call 800-343-0860 to speak with a Fidelity Representative.

Visit www.netbenefits.com/scu to view plan details and account access links to the SCU retirement providers.

Investing involves risk, including risk of loss.

Screenshots are for illustrative purposes only.

System availability and response times may be subject to market conditions.

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