

Happy Holidays! As we head into the holiday break, we'd like to give you an update on the retirement plan transition. As a reminder, we are transitioning to TIAA as sole recordkeeper for the Defined Contribution 401(a) and Tax-Deferred Annuity 403(b) plans. The process will be complete in February 2019. **REMINDER: This change will not impact employees in the PERA defined benefit plan or in the PERA 401(k) or 457 plans.**

Upcoming communications and education

In January and February, you will receive information that will explain the changes and prepare you to take necessary action:

- **On January 4**, you will receive a CMU email, which will include a comprehensive transition guide detailing the transition process and timelines, the new core investment menu, and what you need to do. The guide will also be posted to TIAA.org/mesa on this date. Also in this email will be an important notice about accessing Fidelity and VALIC accounts during the transition period. This notice will also be mailed to your home address as required by regulations.
- **In mid-January**, the transition guide will be mailed to your home address in case you are not able to check your email or the TIAA website.
- **The week of January 28**, representatives from Insight Financial Solutions, CMU's independent advisor, and TIAA will be on-campus hosting open forums. You'll be able to hear first-hand how the transition works and what you need to do. Please see below for a full meeting schedule. All meetings will be held in the University Center Room 221.

January 28 from 12:00 – 1:00 pm and 4:00 – 5:00 pm

January 29 from 8:00 – 9:00 am; 12:00 – 1:00 pm and 5:00 – 6:00 pm

- **The week of February 4**, Insight Financial Solutions and TIAA will be on-campus to meet with you one-on-one, as desired, to discuss how the transition impacts you, what you may want to do, and answer any questions you have. Later, you will receive a separate notice regarding available times in February to schedule an appointment.

If you would like to visit with TIAA, please call **800-732-8353**, weekdays, 6 a.m. to 6 p.m. (MT). To schedule an on-campus appointment with Insight Financial Solutions, [click here](#).

coloradomesa.edu/human-resources/faculty-staff/retirement.html.

Starting January 8: You need to choose new investments and review your beneficiary

You will be able to sign in at TIAA.org/mesa to review the new core investment menu and choose how your new TIAA account will be invested. If you take no action and do not choose an investment(s) by February 13, your new TIAA account will be invested in the plan's default investment option, an age-appropriate American Funds Target Date Fund. You will continue to have the option to change the investment choices after that date. You will also be able to review and update your beneficiary at TIAA during this time.

Tax-deferred annuity 403(b) salary deferral agreement

As a reminder, CMU is converting elective contributions from a flat-dollar amount to a percentage of pay. If this impacted you, you should have received a CMU communication on November 30th to update your salary deferral form. These forms must be updated and returned to the HR Office by January 2. If

you need assistance or another copy of the form, please contact Amy Grimes in the HR office at **970-248-1578**.

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