

As we announced in December, the retirement plan transition was temporarily put on hold while we revised its impact on participant investing strategies. We are happy to share that the transition has been rescheduled, and it is expected to be complete in March. At that time, TIAA will become sole recordkeeper for the Defined Contribution 401(a) and Tax-Deferred Annuity 403(b) plans. Please keep reading to learn what to expect next. *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 February, you will receive information that will explain the changes—including how they impact your account—and prepare you to take action:

- **On February 11** 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 late February** the transition guide will be mailed to your home address in case you are not able to check your email or the TIAA website.
- **On March 6 & 7**, 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. You are strongly encouraged to attend one of these forums. Please see below for a full meeting schedule. All meetings will be held in the University Center.

March 6, 2019 **12:00 pm – 1:30 pm, University Center Room #221**
4:00 – 5:30 pm, University Center Room #221

March 7, 2019 **7:30 – 9:00am, University Center Room #225**
12:00 pm – 1:30 pm, University Center Room #213
5:00 – 6:30 pm, University Center Room #213

- **The week of April 1**, 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. Feel free to schedule directly with one or the other at the links provided below.

Tuesday, April 2 thru Thursday April 4, 2019 **8:15 am to 5:00 pm**
Friday, April 5, 2019 **8:15 am to 12:00 noon**

You will be notified of the location when you register.

To schedule your one-on-one 45 minute session with TIAA, [click here](#) or call **800-732-8353**, weekdays, 6 a.m. to 6 p.m. (MT). To schedule a 45 minute on-campus appointment with Insight Financial Solutions, [click here](#).

And as always, for more information, please visit coloradomesa.edu/human-resources/faculty-staff/retirement.html.

Laura Glatt

Vice President for Finance and Administration/CFO

Colorado Mesa University

1100 North Avenue

Grand Junction, CO 81501

970-248-1867 (Phone)

970-248-1061 (FAX)

lglatt@coloradomesa.edu

