

The transition to TIAA, as the sole recordkeeper for CMU's 401a and 403b retirement plans, is underway. Here is a quick run-down of the timeline.

- Expect to see increased communication before the Thanksgiving holiday
- You will receive a comprehensive transition guide in early January
- There will be about a month long enrollment window beginning in early/mid-January to mid-February for you to make investment decisions around the new CORE line-up
- Campus open forums are tentatively being planned for the week of January 28, to be followed by one-on-one sessions the week of February 4
- Movement of old plan assets (TIAA, VALIC, Fidelity and MetLife) anticipated to be completed by the end of February

Please continue to refer to the transition web site for more information: <https://www.coloradomesa.edu/human-resources/faculty-staff/retirement.html>

Also, Insight Financial Solutions, CMU's retirement partner, will continue to hold on-campus office hours each Monday afternoon. You can sign up at: <https://www.signupgenius.com/go/60b0c45afab23a3fb6-retirement>

These hours will be adjusted periodically based on demand. If you would like to schedule an off-campus meeting with Insight, please contact:

Kevin Price
(970) 201-6533
kevin.price@lpl.com

Jason Stanfield
(970) 986-8053
jason.stanfield@lpl.com

Insight Financial and TIAA will be available at the Benefit Fair – Monday, November 5 and Tuesday, November 6. Which will be held in the University Center Ballroom from 7:30 a.m. to 12:00 noon each day.

REMINDER: This change will not impact employees in the PERA defined benefit plan or in the PERA 401k or 457 plans.

Thank you. Laura

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*