

# Quick Start Guide

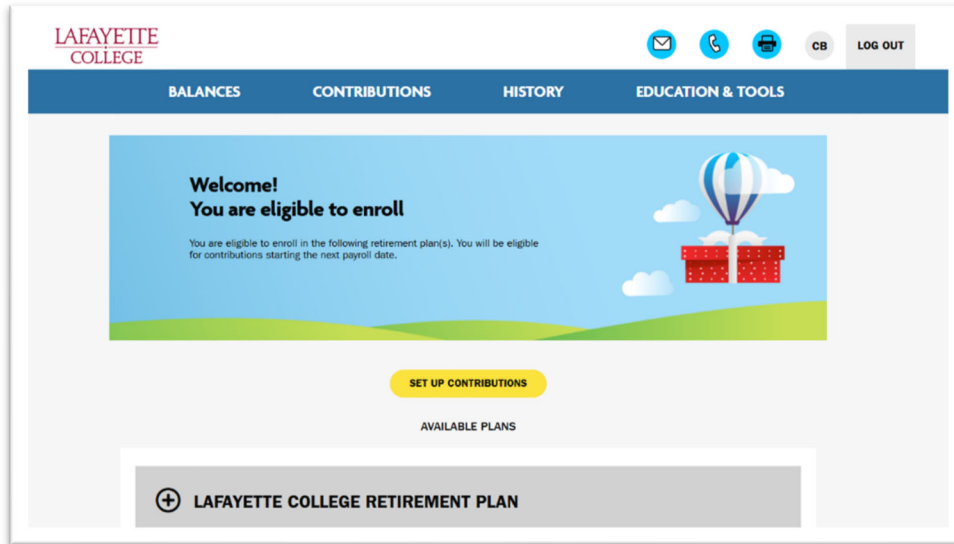
Everything for your employer's retirement plan.  
In one location.


Welcome to Retirement@Work®<sup>®</sup>, where you can:

- Enroll in your retirement plan(s)
- Change your voluntary contribution amount at any time
- Choose your preferred retirement plan provider(s)
- View retirement plan balances across plans and investment providers
- Access tools and resources for planning

# 1. Access Retirement@Work

Click the link provided by your employer to gain access to Retirement@Work. If prompted, log in or register for access.

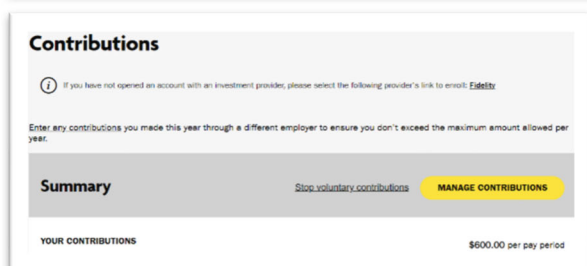
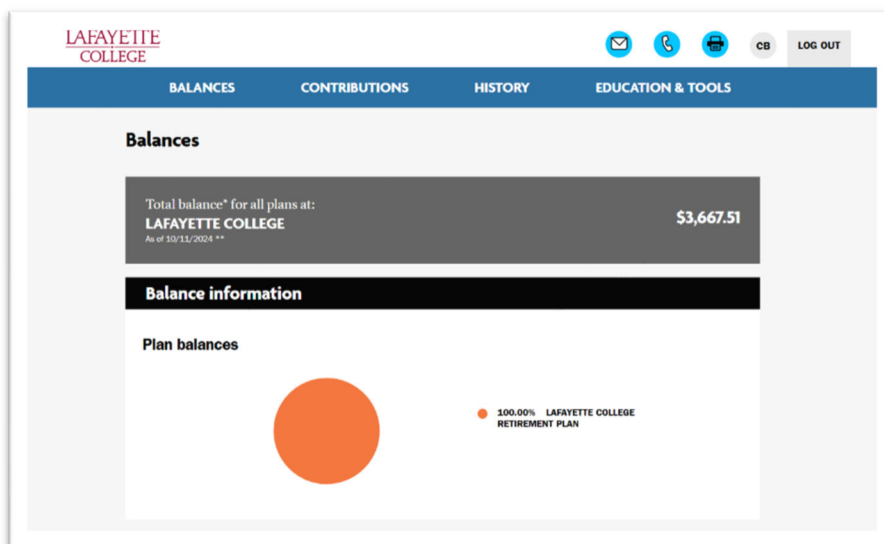


  
Click the + next to each plan to read more information and review available investment providers.

# 2. Set up and manage your contributions

**First time users:** Click *Set Up Contributions*.

**Returning users:** You will be taken to the *Balances* tab where you can view your total balance in the Plan, regardless of provider. To change your contributions, go to the *Contributions* tab and click *Manage Contributions*.



On the next page, enter the amount you want to contribute to the voluntary plan(s) per pay period and when you want contributions to start.

### 3. Select investment providers

Decide if you want to direct all of your contributions to the same investment provider(s) and click **Yes** or **No**.

If you choose **Yes**, all plans in which you contribute and all contribution types—which, based on your plan(s), may include employee contributions, pretax, and Roth—will be directed to the same investment provider(s) in the same percentages.

If you choose **No**, you will then make your choices by individual plan and contribution type.

Enter the percentage you wish to allocate to each provider. Ensure your total equals 100 percent.

The screenshot shows the 'SET UP CONTRIBUTIONS' page on the Lafayette College retirement portal. The page has a blue header with 'LAFAYETTE COLLEGE' and navigation links for 'CONTRIBUTIONS', 'HISTORY', and 'EDUCATION & TOOLS'. The main content area is titled 'SET UP CONTRIBUTIONS' and contains two sections. The first section, 'Who would you like to handle your retirement investments?', asks 'Which provider fits you best?' and provides a link to 'Research these investment providers'. Below this, it asks 'Direct all contribution types to the same investment provider(s)?' with a note that contribution types may vary by plan. The 'Yes' option is selected with a radio button. The second section, 'How do you want to direct your contributions?', asks the user to enter the percentage for each provider. Two providers are listed: TIAA and Fidelity, each with a text input field containing '50' and a '%' sign. A green note indicates 'TOTAL (must equal 100%): 100%'. At the bottom, there are 'BACK' and 'NEXT' buttons.



You may contribute to more than one provider

## 4. Review your contributions

Check to be sure your desired selections are reflected in the summary.

If they are not, click the *Edit* button to make changes.

Once your selections are shown, review the “Terms and Conditions,” check the box, then click *Confirm*. The next page will confirm that your elections were submitted.

## 5. Open your investment account(s) and select investments

Click the name of each provider you selected to open an account with (if you do not have one already) and select your investments by plan. You will exit Retirement@Work and be taken to each provider’s website to complete this task. If you selected more than one provider, **you must return to this page** to click each provider’s name to complete the process.

SET UP CONTRIBUTIONS

### Confirmation: Your elections were submitted

You have successfully set up how much you will be contributing to the following retirement plan(s). Please continue in order to complete your enrollment.

**NEXT STEP: Open Your Investment Accounts**  
Click the buttons below to do so.

TIAA FIDELITY

You have successfully set up your retirement contributions.

#### Contributions Summary

YOUR CONTRIBUTIONS	\$1,616.00 per pay period
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#### LAFAYETTE COLLEGE RETIREMENT PLAN

EMPLOYEE ELECTIVE NON-MATCHED	\$1,000.00
EMPLOYEE ELECTIVE NON-MATCHED (ROTH)	\$616.00
EMPLOYEE MANDATORY MATCHED	Contributing

50.00% TIAA  
50.00% FIDELITY

EFFECTIVE DATE 11/22/2024

TAKE ME TO

# Need help? We've got you covered.

## Site support

Call Retirement@Work at **844-567-9090**, weekdays, 8 a.m. to 10 p.m. (ET).

## Advice and education

You can get help deciding how to create the right investment mix with your chosen investment provider(s), over the phone.

- TIAA: **800-842-2252**
- Fidelity Investments: **800-835-5097**

## General plan questions

Call Lafayette College Human Resources at 610-330-5060 or email [HROffice@lafayette.edu](mailto:HROffice@lafayette.edu).

## Learn more

Visit [retirementplans.lafayette.edu](http://retirementplans.lafayette.edu).

This short video provides a step-by-step visual guide to using Retirement@Work. **Watch the video here.**