If enrolling for the first time, go to NetBenefits.com/Calstate and click on Enroll

Existing participants may log in to NetBenefits, to stop, start, or change deductions.

What would you like to do?

**Contribute to a 403(b)**

Active employee?

Yes

Stop - ineligible

No

**Transfer of Eligible Funds**

1. From Legacy Vendor to Fidelity
2. From non-CSU employment to Fidelity

Active employee?

Yes

Employee contacts Fidelity (800) 343-0860.

No

Stop - ineligible

**Take a Loan or Take a Hardship Withdrawal**

*Take a Hardship Withdrawal*

1. Medical expenses
2. Purchase a primary residence
3. Tuition related fees
4. Prevent eviction
5. Funeral expenses
6. Repairs to your home due to theft, fire, storm

Active employee?

Yes

Employee contacts Fidelity.

No

Stop - ineligible

**Cash distribution, or rollover to an IRA or other qualifying plan**

At least age 59 ½?

Yes

Mail
CSU Chancellor's Office
Attn: Systemwide Benefits
401 Golden Shore
Long Beach, CA 90802
Or Fax
(562) 951-4695

No

**CalPERS Service Credit Purchase**

Plan Administrator signature on the Certification Form: Plan to Plan Transfers and Direct Rollovers

Active employee?

Yes

Stop - ineligible

No

Employee contacts approved Legacy Vendor. If Vendor is not listed on the approved Legacy Vendor list below, mail or fax to the Chancellor’s Office for signature.

- Ameriprise Financial
- AXA Equitable
- Fidelity
- Lincoln
- National Life Group
- TIAA
- VALIC

*Additional documentation will need to be submitted to Fidelity demonstrating need for hardship withdrawal. Approval of hardship withdrawal is determined by Fidelity.*

Revised: February 2019