

Enroll in your California State University (CSU) 403(b) Supplemental Retirement Plan (SRP) account with Fidelity Investments.

ENROLL IN 3 EASY STEPS!

STEP 1: Enroll with Fidelity Investments.

If you are logging on for the first time, you will need to establish a username and password. If you already have a Fidelity.com or NetBenefits® account, you may log in using your existing username and password.

1. Go to www.netbenefits.com/calstate.
2. Click **Enroll** in the middle of your screen.

The screenshot shows the top of the enrollment page. At the top left is the CSU logo and name. At the top right is the Fidelity Investments logo. Below these is a navigation bar with four red buttons: 'Get Started', 'Plans & Investments', 'Tools & Resources', and 'Contact Us'. The main content area features a large graphic with the text 'California State University 403(b) Supplemental Retirement Plan' and 'Putting your FUTURE to work for YOU'. To the right of this graphic is a section titled 'Preparing for Your Future Today' with three bullet points: 'I'm Just Starting', 'I'm Already Enrolled', and 'I'm Nearing Retirement'. Below this is a row of three red buttons: 'First Step' (with subtext 'Take advantage of your employer offered retirement savings plan'), 'Learn More' (with subtext 'Explore the options of your workplace retirement savings plan'), and 'Enroll' (with subtext 'Sign up now'). Each button has a 'Go' icon at the bottom right. The 'Enroll' button is circled in red.

3. Enter your SSN and confirm plan 50537 is selected.

Welcome to Enrollment for Your Employer's Retirement Plan

There are three steps to complete your enrollment. This process should take approximately **15 minutes**, with additional time for additional plans.

- 1 Account Setup** Provide us with your personal information and your consent.
- 2 User Registration** Select a Customer ID and PIN to access your account online and/or Log On.
- 3 Enroll in Plan** Make decisions about contributions amounts and investments.

This online application is only intended for use by U.S. citizens and U.S. resident aliens. If you are a non-resident alien, or a U.S. citizen with a foreign address, please call a representative to complete a paper application.

Let's get started. Please enter your Social Security Number (SSN).

SSN - - xxx-xx-xxxx [Why do I need to give my SSN?](#)

Where possible, we have supplied your plan ID(s). Please indicate any plan you wish to enroll by checking the box next to it before selecting Continue.

Plan ID 50537 Include this plan

You can add additional plans by entering the ID below.

New Plan ID [Where do I get my Plan ID?](#)

[Add Another Plan?](#)

Continue

STEP 2: Establish a username and password

4. **Create a Username.** Your username can be your Social Security number; however, to better protect your account, we strongly recommend that you create a unique username. Once you create a username, you cannot revert to your Social Security number.

5. **Create a Password.** Your password protects your account from unauthorized users. A strong password is one that is between 15 and 20 characters, has a mix of case sensitivity, numbers, letters, and special characters.

Your password should *not* be personally identifiable information, such as your Social Security number, telephone number, or date of birth.

6. **Create a Security Question.** If you ever forget your password, you can reset it after Fidelity verifies your identity using your new or updated security question and answer.

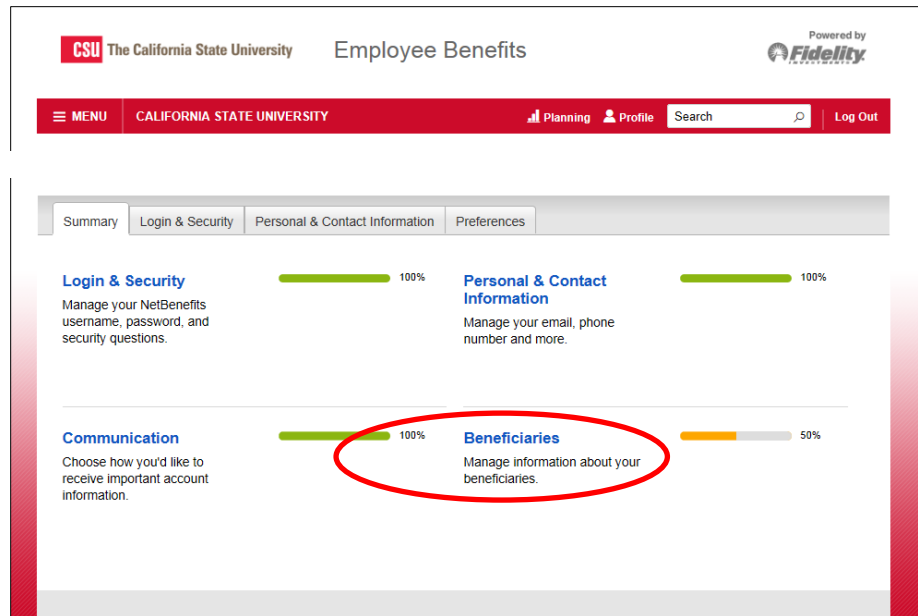
7. **New User Registration Confirmation.** If you have other accounts you access via Fidelity.com, NetBenefits®, or eWorkplace®, your new log in information applies to these accounts, as well as to accessing your account by phone.

8. **Enroll in Plan:** Make decisions about contribution amounts and investments.

STEP 3: Establish Your Beneficiaries.

Please make sure to assign beneficiaries to your CSU 403(b) SRP account. Once you have named a beneficiary, be sure to review your choices regularly and update them after certain life events, such as marriage, divorce, the birth of a child, or a death in the family.

1. Log on to your account through www.netbenefits.com/calstate.
2. From the home page, click on *Profile*, then *Beneficiaries* in the *Summary* section.



3. You will see sections for Primary Beneficiaries and Contingent Beneficiaries. A Primary Beneficiary is your first choice to receive the value of your retirement account. A contingent beneficiary is your second choice to receive the value of your retirement account if the primary beneficiary(ies) is (are) not living at the time of your death. To add one or more of either type of beneficiary, click on the "Add a Primary Beneficiary" or "Add a Contingent Beneficiary" buttons.
4. Indicate whether you are married or not by clicking on the "Edit" button in the Martial Status box.
5. You may enter a person, estate, organization or trust as a beneficiary. Depending on which you choose, you will be asked to provide additional information.
6. Click the "Save All" button in the *Review and save your choices* section.
7. Your beneficiary designations will become effective as soon as you complete the online designation process.

NEED HELP?



Call

877.CSU.3699 (877.278.3699) to speak with a Fidelity Representative, Monday through Friday, from 5:30 a.m. to 9 p.m. Pacific time.



Click

NetBenefits.com/calstate for information specific to your CSU 403(b) SRP account.

Visit

Getguidance.fidelity.com to schedule a confidential consultation.

Investing involves risk, including risk of loss.