Retirement Manager Enrollment

CSU | Cleveland State University

→ **New 403(b) Enrollee?** Here's how to enroll.

In a few simple steps, you can start contributing to your plan.

- Set up your contribution through Retirement Manager
- Set up your account with your selected vendor (TIAA, Fidelity, Voya, or Corebridge)

To begin the enrollment process, go to www.myretirementmanager.com, and follow these simple steps:

1. Click the **"New User"** or **"Get Started"** option as a first-time user.
2. Enter Cleveland State University as your employer, then *verify your employee record* by entering your Last Name, Date of Birth, CSU Employee ID, and the last 4 digits of your Social Security Number.
3. Set up your Username and Password by following the screen prompts for **"Security Profile Setup"**.
4. Under the section titled **"I Want To"**, select **"Change Contribution".**
5. Select **"403B Plan"** for your contribution selection.
6. From the drop-down listing, select the *paycheck date* to start your deferral.
7. Select "**Ongoing Contribution"** from the contribution change screen and enter the amount ($) of your per paycheck deferral. *Note: Pre-tax and Roth Post-tax contributions are in separate sections.*
8. After careful review, If you are satisfied with your contribution election and paycheck start date, click the **"Submit"** button or click the **"Cancel"** button to restart your contribution selection.
9. Under **"Investment Provider Contacts",** select your vendor (TIAA, Fidelity, Voya, Corebridge) and complete the enrollment process by clicking on the URL link.
10. Upon accessing the vendors website, follow the prompts to create your 403(b)-tax sheltered annuity account.

→ Already Enrolled in the 403(b) Plan?

Follow steps 4 – 8 above to update your current deferral or restart your election.

- Change your election amount for a future paycheck date
- Update your election from pre-tax to Roth post-tax
- Add a Roth post-tax deferral

If you need assistance utilizing Retirement Manager, please contact their Client Care Center at 1-866-294-7950.

In addition, you can also utilize Retirement Manager to request eligibility approval for loans, hardship withdrawals, transfers and distributions (separated from service under age 59 1/2).