



UNIVERSITIES OF WISCONSIN

UW 403(b) Supplemental Retirement Program (SRP) EZ Enrollment

To EZ enroll in the UW 403(b) SRP with TIAA and/or Fidelity complete the information below and return this form to GetHelpUW@support.wisconsin.edu for all campuses except Madison and Milwaukee, benefits@ohr.wisc.edu for UW-Madison, or benefits@uwm.edu for UW-Milwaukee. For questions, contact your [Institution Benefits Contact](#).

IMPORTANT: This form is for **new enrollments**. For changes to your current deduction with TIAA or Fidelity, submit a [Salary Reduction Agreement](#) (SRA) or log into my.wisconsin.edu.

SCAN ME TO



ACCESS LINKS

Part 1

Provide your personal information and paycheck effective date.

Effective Date: ☐ As soon as possible
(select one) ☐ _____
Paycheck (mm/dd/yyyy)

Name: _____ Employee ID: _____

Address: _____ City: _____ State: _____ Zip: _____

Work Email: _____ Phone Number: _____

Part 2

Choose your provider(s), election type(s), and amount(s) per pay period.

Select a percentage of pay or a flat dollar amount for before-tax and/or after-tax (Roth) for the provider(s)¹ you want to enroll with². The funds you contribute³ will be invested in the Vanguard Target Retirement Date Fund⁴ based on your date of birth. TIAA and Fidelity offer the same investment options.

You can change or stop your contribution at any time by submitting a [Salary Reduction Agreement](#) to the appropriate email address listed above. You can change your investments by logging into your account(s) or contacting your provider(s)⁴.

Before-tax Election:

Begin my pre-tax contributions at:

Begin my pre-tax contributions at:

After-tax (Roth) Election:

Begin my Roth contributions at:

Begin my Roth contributions at:

TIAA
Plan #100988

☐ _____ %

☐ \$ _____

☐ _____ %

☐ \$ _____

Fidelity
Plan #82828

☐ _____ %

☐ \$ _____

☐ _____ %

☐ \$ _____

Note: Elections made are taken out of Group 2 pay periods.

If you choose 100%, ALL of your salary will be deducted after federal and state deductions. You will have \$0.00 take-home pay.

¹ If you elect multiple providers, you will receive separate statements for each provider.

² A percentage of pay and flat dollar amount cannot be chosen for the same election type under one provider.

³ All contribution amounts are subject to [IRS annual contribution limits](#).

⁴ For provider contacts and information on Target Retirement Date Funds and investments, visit the [UW 403\(b\) SRP website](#).

Part 3

Provide your signature and date.

I understand that it is my responsibility to select and monitor my investments to make sure they continue to reflect my financial situation, risk tolerance, and time horizon¹. I understand I can change my investment election(s) at any time.

I understand that I can change my contribution amount(s) at any time by submitting a new Salary Reduction Agreement to my Institution Benefits contact or logging into MyUW Portal.

I understand that an account will be set up for me and there may be additional steps I need to take to finish setting up the account².

Signature: _____ Date: _____

¹ You should reexamine your strategy at least annually or whenever your financial situation changes. You may also wish to consult a financial advisor.

² After your first contribution is posted, you should designate a beneficiary by providing the information online or calling the provider for a form. You will need the social security number, date of birth, and address for each beneficiary.

Return this form to benefits@ohr.wisc.edu (UW-Madison), benefits@uwm.edu (UW-Milwaukee) or GetHelpUW@support.wisconsin.edu for all other campuses. Deductions from your paychecks will be processed as soon as administratively possible. For questions, contact your [Institution Benefits Contact](#).

FOR OFFICE USE ONLY

Employee ID: _____ Pay Period Effective: _____ Input By: _____ Date Entered: _____