

Prepare for CU Retirement Plan changes at Transition Workshops ^[1]

February 24, 2015 by [\(not verified\)](#) ^[2]

As [CU prepares to modernize its 401\(a\) and 403\(b\) retirement plans this July](#) ^[3], we encourage you and your team to attend on-campus workshops about these important changes and what they mean to you.

You don't have to register to attend a [Transition Workshop](#) ^[4], March 6 – April 17. Representatives from TIAA-CREF, CU's sole retirement plan service provider as of July 2015, will run the workshops alongside CU and Innovest Portfolio Solutions, the university's third-party retirement plan consultant.

What you'll learn

- 1. What's changing with the Plans**—Attend a Transition Workshop to learn about how CU will replace the funds within its 401(a) and 403(b) plans with a selection of vetted, highly rated, best-in-class investment choices from various retirement funds. Presenters from CU, Innovest and TIAA-CREF will talk about the to-be-launched self-directed brokerage option, for experienced investors who wish to select their own funds outside the new core investment menu. TIAA-CREF also will discuss its role as the service provider of the Plans and their new funds, as well as what support and guidance you can expect from the TIAA-CREF financial consulting team.
- 2. How you'll be affected by the change**—You can expect the funds within your current CU retirement Plan(s) to change. TIAA-CREF and Innovest will provide information about how some existing funds will be transferred into the new investment lineup, and how contributions after the transition will automatically be invested in those new funds.
- 3. How and why this decision was made**—Presenters will share information about the nearly year-long process that led to these changes. They also will cover how the new investment lineup and service provider structure will save participants money in administrative fees, offer more transparency, provide opportunities to invest in highly rated funds within and outside the Plans' core investment menus, and give participants access to guidance from TIAA-CREF financial consultants.
- 4. Next steps**—We'll let you know about next steps and important upcoming dates to help you through this transition.

Learn more by visiting the Retirement Vendor Transition website at www.cu.edu/nestegg [3].

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