



University of Colorado

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EMPLOYEE SERVICES

THE RETIREMENT NEST EGG YOU WANT.

The helpful support you deserve.

We've heard from hundreds of CU employees, and the message is clear: You want to know more about [changes coming to your retirement plan\(s\) this summer and what you need to do](#).

That's why we're offering dozens of on-campus [Transition Workshops](#), from March 6 – April 17. They are designed to walk you through how and why this decision was made, and what it means to you.

You don't have to register to attend a workshop.

What you'll learn

1. **What's changing with the Plan(s)**—Attend a Transition Workshop to learn about CU's new lineup of 401(a) and 403(b) plans, a selection of vetted, highly rated, best-in-class investment choices from various retirement firms, including Vanguard, BlackRock, Dodge & Cox, and Wells Fargo.

Presenters from CU, TIAA-CREF and Innovest Portfolio Solutions also will explain 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 will discuss its role as the service provider of the Plans and the Plans' 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.

[See the Transition Workshop schedule](#) and learn more about the transition by visiting the Retirement Vendor Transition website at www.cu.edu/nestegg.

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This is a required communication from the University of Colorado.