

# University of Alaska Online Enrollment Guide

Opening a Retirement Account with Fidelity Investments is now more convenient with a simple online process that can be completed in 15 minutes or less! All you need to do is:

1. Note your Plan ID numbers; Pension plan 401(a) **65797**, ORP employer contributions 401(a) **52027**, ORP employee contributions 403(b) **57642**, Voluntary Tax-Deferred Annuity plan 403(b) **57643**  
– *You will need this when you enroll online*
2. Provide your personal information
3. Choose your investment options
4. Designate your beneficiary(ies)— *You will need the date(s) of birth for each of your beneficiary(ies)*

**Take this very important step now and begin contributing to your University of Alaska Retirement Plan!**

## Step 1 Log On and Enroll

- Log on to **Fidelity Online Enrollment**: <http://enrollonline.fidelity.com>
- Follow the prompts for each section at Fidelity's online enrollment site
- You will be notified when you have completed your enrollment

## Step 2 Confirm Your Enrollment

- Review a summary of the information you provided for accuracy
- Revise any information, if necessary
- Accept the data once it is all correct
- Note the confirmation number for future reference

## Step 3 Complete the necessary University of Alaska forms

Following enrollment, you must complete the University of Alaska Pension Plan and/or ORP enrollment/change form to initiate contributions to your account. For the voluntary TDA only, please also complete the Salary Reduction Agreement (SRA). All forms are available on the University of Alaska benefits website: [www.alaska.edu/hr/benefits/](http://www.alaska.edu/hr/benefits/). Please return the University of Alaska forms to your regional HR office.

## Step 4 Access Your Account

Once you receive confirmation of your enrollment from the system, you can access your retirement plan account on Fidelity's NetBenefits<sup>SM</sup> at [www.fidelity.com/atwork](http://www.fidelity.com/atwork). Here you can take advantage of educational tools, make transactions in your account, and review investment information.

*Instructions for accessing NetBenefits<sup>SM</sup> are included on the reverse side of this guide.*

## Getting started with NetBenefits<sup>SM</sup>, Fidelity's online account information and education tool

### Step 1 Select a Personal Identification Number (PIN)

Before you can use NetBenefits, you must establish a personal identification number (PIN). **In the future you must enter this number before you can access account specific information through a Retirement Services Specialist, the Internet, or our automated phone system.** Your PIN must be 6 to 12 digits in length; it cannot be your Social Security number or date of birth; and it cannot be sequential or repeating (e.g., 123456 or 777777).

You will need the following information in order to establish your PIN:

- your date of birth
- your zip code
- You will also be asked to create a reset pass phrase (RPP). You will have the option of selecting from one of five categories for your RPP

### Step 2 Set up your PIN

Simply complete the following steps to set up your PIN:

- Log on to [www.fidelity.com/atwork](http://www.fidelity.com/atwork)
- Access NetBenefits<sup>SM</sup>, our online account access service
- Select either the Create a PIN or Forgot/Reset PIN link
- Enter your Social Security number
- Follow the instructions regarding entry of the above information
- Enter a 6 to 12 digit PIN
- Confirm your entry as instructed

## If you have any questions

Call a Fidelity Retirement Services Specialist at **1-800-343-0860** Monday through Friday from 4:00 A.M. to 8:00 P.M. Alaska Time. Our Specialists can answer your questions and help you complete the steps necessary to enroll online or begin directing your investments through your workplace savings plan.

Employees with a hearing or speech impairment can access our Retirement Services Specialists at 1-800-259-9743.

*Unless otherwise noted, transaction requests confirmed after the close of the market, normally 4:00 P.M. ET or on weekends or holidays will receive the next available closing prices.*

**Before investing in any mutual fund, please carefully consider the investment objectives, risks, charges and expenses. For this and other information, call Fidelity at 1-800-343-0860 or visit [www.fidelity.com](http://www.fidelity.com) for a free prospectus. Read it carefully before you invest.**

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