

NSU BENEFITS

Retirement Manager Quick Reference Guide



MY SAVINGS MANAGER

I would like to...

- Start or Change my Contributions
- Request a Loan
- Request a Withdrawal



PLAN INFORMATION

View details on...

- My Balances
- My Plan Information
- My Benefits Office Contacts
- My Investment Provider Contacts



FINANCIAL TOOLS

Show me more about...

- Financial Education
- Retirement Planning
- Am I On Target
- Financial Calculators

Access Retirement Manager Online at www.myretirementmanager.com

NSU BENEFITS

Getting Started

This Quick Reference Guide will assist you in navigating the Retirement Manager website and completing important tasks related to your retirement plan. If you are new to the Retirement Manager website, you will need to register by providing Retirement Manager with your employer name and some information about yourself. Your USER ID is always your NSU ID Number.

To register, click the “I’m a New User” link on the main login page and follow the screen prompts for “User Verification” and “Security Profile Setup”.





What’s First?

1

If you are a new user, click “I’m a New User” to register.

2

If you are an existing user, type in your User ID and click “Next”



1 USER ID

NEXT

2 New User

[I Forgot My User ID](#)

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Existing Users


If you have previously logged in and have been using Retirement Manager, enter your “USER ID” on the first page and click “Next”.

Enter your password on the second page, and click the “Submit” button to login.

3


Enter your Password

Enter your password and click the Submit button to login to Retirement Manager

 RetirementManager

Login to Retirement Manager

If you do not see your security image and title, re-enter your user id on the previous page.

Verify your Security Image 

Verify your Security Image Title **kitten**

Enter your Password [I Forgot My Password](#)

CANCEL **SUBMIT**

Security Reminders

- Use a personal bookmark of Retirement Manager to access the site. Do not rely on links provided in email.
- Keep your User ID and password protected and avoid giving it and other personal information out to others.
- Understand what Phishing is and how to [avoid Phishing scams](#).
- When visiting Retirement Manager, inspect the URL in the address bar carefully and verify that it is spelled correctly and includes "https" at the beginning.
- Close your browser when you have ended your session with Retirement Manager. This is especially important if you are using a public computer.
- Keeping your operating system, browser, and anti-virus products current can eliminate security risks.

HELP

SECURITY PRIVACY



Security Profile Setup

Once you have confirmed your identity with Retirement Manager you'll setup a Security Profile. New users will be automatically directed to set up their Security profile. Existing users can create or edit their Security Profile via the "My Profile" link on the Retirement Manager home page.

1

Create a User ID

Using the guidelines on the right side of the page, type in your user ID and click the "Check Availability" button to make sure your user ID is available.

2


Confirm your Email

The Email address you enter here will be used to send you your password should you ever need to have it reset.

3

Confirm Your Password

Using the guidelines on the right side of the page, enter a secure password that will be easy for you to remember, but not easy for others to guess.

 RetirementManager

Security Profile Setup

Step 1: Enter Your User Information

Create a User ID:

Check Availability

Enter Your Email Address:

Confirm Your Email Address:

Create a Password:

Confirm Your Password:

1

Your User ID is required to be 5-25 characters long, and may contain letters (A-Z, a-z) and numbers (0-9). Your User ID is not case sensitive.

2

The email address you enter will be used for password resets.

The password must be between 8 and 12 characters in length, and must satisfy all of the following requirements:

- At least one lower case letter
- At least one upper case letter
- At least one numeric digit surrounded by non-numeric characters

Please enter your password, then re-enter the same value in the Confirm Your Password box for confirmation and click Continue.

3

Password examples:

Two short words separated by a number are acceptable: Nine1one, Day2Week, MONEY4us, BaRgE2In

One long word with an embedded number is better: gr8Fully, corDN8ed, BizzN3ss, A4dables

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Selecting a Security Image


Once you select a security image see the image on the password page when you login to Retirement Manager. Recognizing this image and title when you login helps protect your access to Retirement Manager.






















Your Security Image

This is an added step in safeguarding your access to Retirement Manager. Choose an image you will remember, it will be presented each time you login to the portal.

 RetirementManager

Security Profile Setup [?](#)
Step 2: Select Your Security Image


Title Your Security Image:

 <input type="checkbox"/>	 <input type="checkbox"/>	 <input type="checkbox"/>	 <input type="checkbox"/>	 <input type="checkbox"/>	 <input type="checkbox"/>	 <input type="checkbox"/>
 <input type="checkbox"/>	 <input type="checkbox"/>	 <input type="checkbox"/>	 <input type="checkbox"/>	 <input type="checkbox"/>	 <input type="checkbox"/>	 <input type="checkbox"/>
 <input type="checkbox"/>	 <input type="checkbox"/>	 <input type="checkbox"/>	 <input type="checkbox"/>	 <input type="checkbox"/>	 <input type="checkbox"/>	 <input type="checkbox"/>

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Security Profile Setup – Security Questions

Security questions help safeguard your access to Retirement Manager. These questions will be used to verify your identity if you forget your USER ID or PASSWORD for Retirement Manager.

Security Questions:

You should select questions and answers that are easy for you to remember, but not easy for others to guess. **Your security question answers are case-sensitive.**

 RetirementManager

Security Profile Setup ?

Step 3: Answer Your Security Questions

Please select and answer two security questions below. These questions will be used to verify your identity should you forget your password.

Select Security Question One:

Please select a question to answer... ▼

Your Answer for Security Question One:

Select Security Question Two:

Please select a question to answer... ▼

Your Answer for Security Question Two:

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Navigating the Home Page

The **My Savings Manager** menu displays retirement plan transactions.

The **Plan Information** menu displays information related to your retirement plans. Account balances are not maintained in Retirement Manager.

The **Financial Tools** menu provides links to financial education resources

The screenshot shows the Retirement Manager Home Page. At the top left is the Retirement Manager logo with a red circle containing the number 1. Below the logo are links for Home, My Profile, and Logout. The page is divided into three main sections: MY SAVINGS MANAGER (teal background), PLAN INFORMATION (brown background), and FINANCIAL TOOLS (green background). Each section has a list of links. At the bottom left, there are three red circles with numbers 2, 3, and 4. At the bottom right, there are links for SECURITY, PRIVACY, and TERMS OF USE.

RetirementManager

Home My Profile Logout

1

MY SAVINGS MANAGER
I would like to...
Start or Change my Contributions
Request a Loan
Request a Withdrawal

2

PLAN INFORMATION
View details on...
My Balances
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My Benefits Office Contacts
My Investment Provider Contacts

3

FINANCIAL TOOLS
Show me more about...
Financial Education
Glossary of Terms
Am I On Target
Financial Calculators
Financial Seminars

4

HELP RETIREMENT MANAGER DEMO FEEDBACK

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Points of Interest

1

Access “My Profile” to set up or change your user id, password, security image or security questions.

2

Need Help? Answers to Frequently Asked Questions.

3

View a brief demonstration of Retirement Manager!

4

We are looking for your feedback! Click this link for a short survey and provide us with your comments and suggestions!



Making or Changing Contributions

To start contributing to your retirement plan, or to change your existing contributions, click on the “Start or Change My Contributions” link from the left menu on the home page. Please note that the screen shots on this page are examples, and may vary based on your plan.

Select a plan:

1

To start or change your retirement contributions, first select your retirement plan. Make your selection from the plans in which you are eligible to make contributions.

Select pay date:

2

The dates listed in this menu are the pay dates available to make contribution changes. You may only make one contribution change per pay date, so if you would like to alter the contribution change for a payroll date, you will need to first delete your pending change.

RetirementManager

Home My Profile Message Center Logout

You are viewing WPHEHM AAEA - N00205747 (Active)

Search SSN/Employee ID

MY SAVINGS MANAGER

Start or Change my Contributions
Select Plan & Payroll Date
Enter Your Changes
Review Your Changes
Confirmation

PLAN INFORMATION

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To start or change your current contributions, select a plan:

The Supplemental Plan

View Current Contributions

Select the pay date you would like your contribution change to begin:

10/14/2011 (available)

Selected pay date is available

Click "NEXT" to proceed to start or change your contribution(s).

CANCEL NEXT

Contribution changes stay in “pending” status until the date elected by the employer prior to the payroll date. Once that date passes, you will not be able to delete or enter a new contribution change for that pay date.

HELP RETIREMENT MANAGER DEMO

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Making or Changing Contributions

To start contributing to your retirement plan, or to change your existing contributions, click on the “Start or Change My Contributions” link from the left menu on the home page. Please note that the screen shots on this page are examples, and may vary based on your plan.


Contribution Change(s):

3

Following the prompts on the screen, select your type of contribution and enter your contribution amount. In this step you will also be indicating your investment provider selections.




RetirementManager



[Home](#) [My Profile](#) [Message Center](#) [Logout](#)

You are viewing WPHEHM AAEA - N00205747 (Active)



MY SAVINGS MANAGER


Start or Change my Contributions

Select Plan & Payroll Date

Enter Your Changes

Review Your Changes

Confirmation



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The Supplemental Plan: **Contribution Change**

This is a Group Specific Text on the top of the Enter Your Contribution Change step.

Your contribution limit for 12/31/2011 is \$0.00.

Employee

Retirement Manager does not have information on record for this contribution.

Please select the type of contribution change you would like to make, and then enter the corresponding amount:

Ongoing Percent (%) Contribution

3

Enter new contribution (%):

Enter a percent (%) of 100 to indicate which provider(s) your contribution will be directed:

Investment Provider	Current %	New %
TIAA-CREF	0%	<input type="text" value="0%"/>
TIAA-CREF (GSRA)	0%	<input type="text" value="50%"/>
VALIC	0%	<input type="text" value="50%"/>
TOTAL	0%	100%

CANCEL

NEXT

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Review Your Contributions

Be sure to review the changes you submit in Retirement Manager and that the ongoing contribution percentage for your election totals 100%. The example below illustrates a 50% contribution to TIAA and a 50% contribution to Valic.

- 4
- Review your Change(s):
- Carefully review your contribution changes and pay dates. You may use the “Cancel” button to return to the Plan Selection page to restart your contribution change. Once you are satisfied with your changes, click the Submit button.

Home

My Profile

Message Center

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NSU

NOVA SOUTHEASTERN UNIVERSITY

You are viewing WPHEHM AAEA - N00205747 (Active)

Search SSN/Employee ID

MY SAVINGS MANAGER

Start or Change my Contributions

Select Plan & Payroll Date

Enter Your Changes

Review Your Changes

Confirmation

PLAN INFORMATION

FINANCIAL TOOLS

The Supplemental Plan: Contribution Change

Review your Contribution Changes below. You must click "SUBMIT" at the bottom of the page in order to confirm and process your request.

Your contribution changes made today will be effective as of your 10/14/2011 paycheck. If you wish to cancel these changes, you have until 11:59 PM Central Standard Time (CST) on 10/14/2011 to do so.

Changes to Employee

Out of your salary, your new Ongoing Percent (%) Contribution will be 6%

and your contributions will be directed to:

TIAA-CREF (GSRA)	50%
VALIC	50%

Email Confirmation

If you would like to receive email confirmation of your contribution changes made today, please enter your email address below:

Email Address:

Confirm Your Email Address:

Click "SUBMIT" to confirm and process your Contribution Changes.

Click "CANCEL" to return to the Plan and Pay Date Selection Menu.

CANCEL

SUBMIT

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Confirm Your Contributions


To start contributing to your retirement plan, or to change your existing contributions, click on the “Start or Change My Contributions” link from the left menu on the home page. Please note that the screen shots on this page are examples, and may vary based on your plan.

5

Your contribution change details may be printed from this page. If you have selected a new investment provider, it is very important to ensure that you have an account set up with that provider to ensure your contributions are directed and invested per your direction. You may use the “Investment Provider Contacts” button to access contact information and enrollment details for your selected provider(s).


Confirmation

**RetirementManager**




[Home](#) [My Profile](#) [Message Center](#) [Logout](#)

You are viewing WPHEHM AAEA - N00205747 (Active)



MY SAVINGS MANAGER

[Start or Change my Contributions](#)
[Select Plan & Payroll Date](#)
[Enter Your Changes](#)
[Review Your Changes](#)
Confirmation



PLAN INFORMATION

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The Supplemental Plan: Contribution Change

Confirmation

Your contribution changes have been received!
Your confirmation number is 796763

[PRINT CONFIRMATION DETAILS](#)

To Complete Your Request...

If you started a contribution with a new Investment Provider, *you must have an account with that provider to properly route your contributions*. Review your Investment Provider Contacts to create or change your investment fund allocations with an existing provider.

[INVESTMENT PROVIDER CONTACTS](#)

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Contact NSU's Retirement Investment Providers

You can use Retirement Manager to make or change your retirement contributions at any time. Representatives from TIAA and Valic provide face-to-face counseling sessions and financial education to help you meet your retirement goals. These services are available at no cost to NSU employees.

TIAA at Nova Southeastern University

- Online at www.tiaa.org/nsu
- Contact an advisor 800-842-2252
- Schedule a counseling session by phone 888-211-3868
- Schedule a counseling session online

Valic at Nova Southeastern University

- Online at www.valic.com/nova
- Contact an advisor 800-448-2542
- Schedule a counseling session
- South Florida - Nicholas R. Brown 954-871-0879 and Steve Proffitt 954-684-6306
- Jacksonville - Paul Fibbe 904-448-7200 or 904-568-5360
- Tampa - Dan Stamey 813-300-7983
- Orlando - Kelly J. Torresin 407.212.5003