

# Quick Start Guide

Everything for the University of Houston-Downtown  
Retirement Plan. All on one site.

Welcome to Retirement@Work<sup>®</sup>, where you can:

- Enroll in the TDA Plan
- Select a provider in the ORD/TDA Plan
- Elect to start or change voluntary contributions in the TDA Plan
- View all University of Houston System Retirement Savings Plan balances, regardless of investment provider—Fidelity, TIAA, Corebridge or VOYA
- Choose your preferred retirement plan provider(s)
- Manage your account on an ongoing basis
- Access investment tools and resources for planning



University of Houston  
DOWNTOWN

# 1. Access Retirement@Work

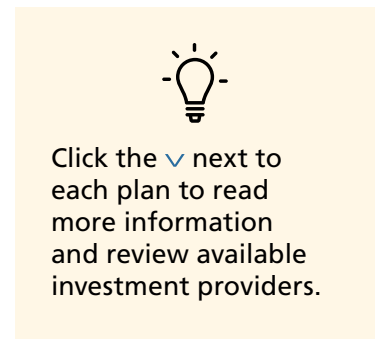
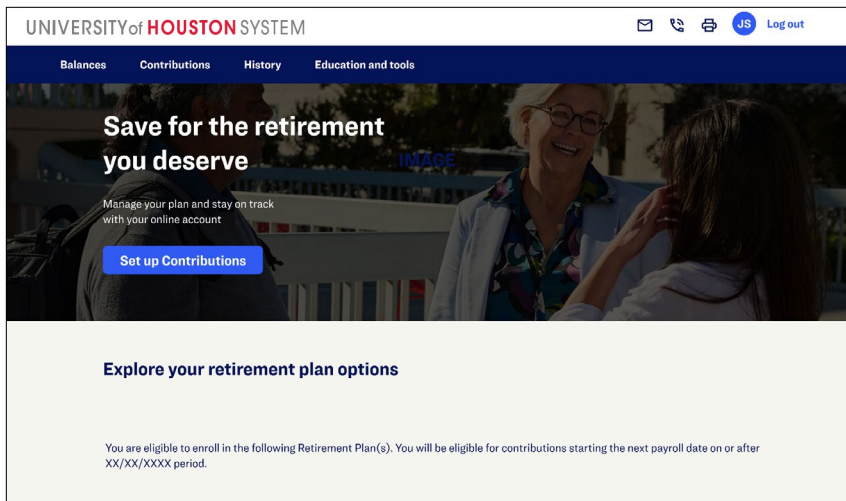
The Retirement@Work portal can be accessed through [University of Houston Downtown-Human Resources website](#)

If you are not able to visit Retirement@Work online, you may make your choices by calling Retirement@Work at: 844-567-9090.

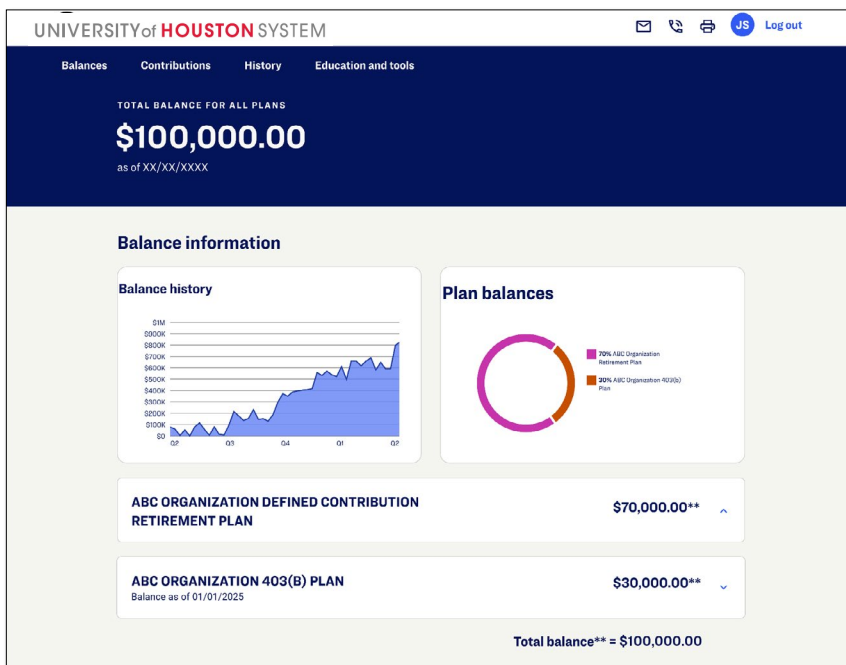
# 2. Set up and manage your contributions

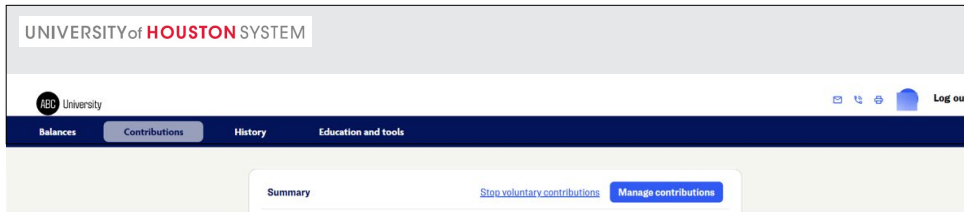
First-time users: Click *Set Up Contributions*.

If enrolling only in the University of Houston System ORP - select '*no voluntary contributions*' during the enrollment.



**Returning users:** You will be taken to the *Balances* tab where you can view your total balance in the plan, regardless of provider. To change your contributions, go to the *Contributions* tab and click *Set up contributions*.





On the next page, enter your contribution amount to the plan(s) per pay period and when you want contributions to start. You have the option to make pretax contributions, Roth after-tax contributions or a combination of both.

### 3. Select investment provider(s)

You can choose one or more investment providers for your retirement accounts.

- Choose Yes to direct all contributions across all plans by percentage.
- Choose No to direct contributions by plan and type, which may include employer or employee (pretax or Roth after-tax).

Enter the percentage you wish to allocate to each provider. Ensure your total equals 100 percent.

**SET UP CONTRIBUTIONS**

**Who would you like to handle your retirement investments?**

Select the [investment providers](#) you would like your contributions directed to. You can choose one or more investment providers

You will need to open an account with the providers you select on each provider's website. A link to each provider's website will be included once your elections have been confirmed

**Which provider fits you best?**

[Research these investment providers](#)

**Direct all contribution types to the same investment provider(s)?**

(Contribution types may vary by plan and can include various employee and employer contributions.) Choosing "No" allows you to direct each contribution type separately.

Yes  
 No

**How do you want to direct contributions?**

Enter the percentage you would like to contribute to each investment provider you select.

TIAA	10	%
Provider 2	20	%
Provider 3	50	%
TOTAL (must equal 100%): 100%		

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The University of Houston will automatically adjust your contribution amount based on each year's IRS limits, so you'll have the opportunity to reach but not exceed the maximum.

## 4. Review your contributions

Check your selections.

Click the *Edit* button to make changes.

Review the “Terms and Conditions,” check the box, and click *Confirm*. The next page will confirm that your elections were submitted.

UNIVERSITY of HOUSTON SYSTEM ✉ 🔍 🖨 JS [Log out](#)

[Balances](#) [Contributions](#) [History](#) [Education and tools](#)

### SET UP CONTRIBUTIONS

#### Review your contributions

**Summary** [Edit](#)

Your Contributions	10.00% per pay period
Employer Contributions	7.00% per pay period

**ABC Organization Defined Contribution Retirement Plan**

7.00% Employer non-elective

■ TIAA ■ PROVIDERZ

Effective date: First available pay check

**ABC Organization 403(B) Plan**

10.00% Employee pre-tax

■ TIAA ■ PROVIDERZ

Effective date: First available pay check

Auto - increase: Off

I have read and accept these [Terms and Conditions](#)

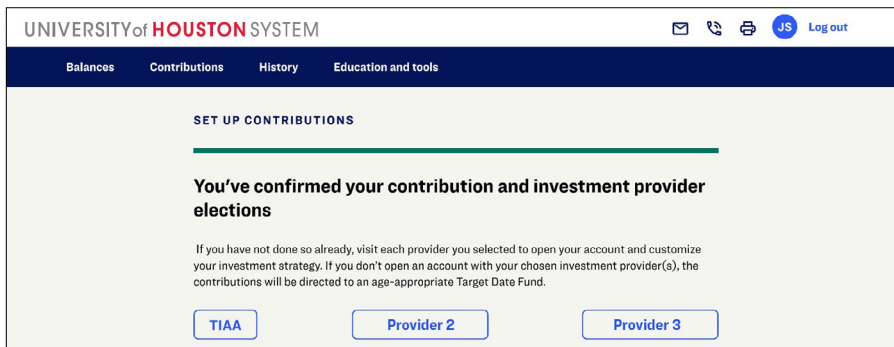
[Back](#) [Confirm](#)

[Save & return later](#)

## 5. Open your investment account(s) and select investments

Click on the name of each provider you selected to open an account with them (if you do not have one already) and select your investments by plan.

You will exit Retirement@Work and be redirected to each provider's website to complete this task. If you selected more than one provider, **you must return to this page** to click each provider's name to complete the process.



You will be required to enter a plan number on the provider's website to continue enrollment:

TIAA:

ORP 100827 / TDA 100828

Fidelity:

ORP 85601 / TDA 85603

Corebridge:

ORP / TDA 01547

VOYA:

ORP 664135 / TDA 664136

# Need help? We've got you covered.

## Website support

Call Retirement@Work at **844-567-9090**, weekdays, 7 a.m. to 9 p.m. CT.

## Advice and education

You can get help deciding how to create the right investment mix with your chosen investment provider(s), over the phone or in person.

- TIAA: 800-842-2252
- Fidelity: 800-343-0860
- Corebridge: 800-448-2542
- VOYA: 888-311-9487

## General plan questions

Email [benefits@uhd.edu](mailto:benefits@uhd.edu) to get in touch with a Benefits representative.

## Learn more

This short video provides a step-by-step visual guide to using Retirement@Work.

[Watch the video here.](#)