



403(b) Accounts with Fidelity Investments

Fidelity Investments allows University of Hawai'i Tax Deferred Annuity participants to establish a new account by downloading the account application form or requesting an enrollment package be mailed.

TO ENROLL WITH FIDELITY INVESTMENTS:

Via mail:

Call Fidelity Investments Retirement Services Center at 800-343-0860, select option #2.

On-line:

1. Access the Fidelity website at www.mysavingsatwork.com
2. Under "Quick Links"
3. Click the down arrow under "Find a Form", select "403(b) Enroll" and click "Go"
4. Follow the instructions and read the information on how to choose investments, fund prospectuses, how much you can save and review the custodial account agreement.
5. Click on "Account Application." Print and complete the Fidelity account application form. Mail the completed form to the address in the General Instructions section or Fax to: 877-808-3432, Fidelity Investments, ATTN: Operations Department. Fidelity Investments will mail an account confirmation in seven days.

TO START UH SALARY REDUCTIONS:

1. You must complete a University of Hawai'i Form 82, Salary Reduction Agreement to specify how much you want withheld from your paycheck. A form fillable version is available at <http://www.pers.hawaii.edu/tda/tda-index.asp>. Do not submit a Fidelity Workplace Savings Plan Contribution Form.
2. Attach a copy of your Fidelity Investment account confirmation to the salary reduction agreement. The copy of the account confirmation is in lieu of a Fidelity representative's signature acknowledgement.
3. Send the completed salary reduction agreement to the UH Office of Human Resources, 2440 Campus Road, Admin Services Bldg 2, Honolulu HI 96822.

QUESTIONS:

For assistance with establishing a 403(b) account, please call 800-343-0860, and select Opt #2 for the Retirement Services Center.

Contact the UH Office of Human Resources for questions related to the UH Salary Reduction Agreement at:

Phone: (808) 956-8643
Email: uh-tda-l@hawaii.edu