

Question: *How do I make changes to my investment elections held with Fidelity Investments on NetBenefits®?*

Step One: Log in to your account www.NetBenefits.com/GVSU using your Username and Password. Select “Register” if you are logging in to NetBenefits for the first time, or “Need Help?” if you’ve forgotten your Username and/or Password.



The screenshot shows the top navigation bar of the NetBenefits website. It includes a 'Your Account' dropdown menu, a 'Username' field, a 'Password' field, and a 'Log in' button which is circled in red. To the right of the 'Log in' button are links for 'Remember Me', 'Register', 'Need Help?', and 'Security Notice'. Below the navigation bar is the 'BENEFITS & WELLNESS' logo with the URL 'gvsu.edu/hrc/benefitswellness' and the Grand Valley State University Human Resources logo.

Step Two: Once you have logged in to NetBenefits, navigate to the “Quick Links” drop down menu beside the plan you’re making updates to. From the drop down, select “Change Investments” to navigate to the next step.



The screenshot shows the 'Retirement Savings' section of the NetBenefits account. It lists two plans: 'GVSU 457(B) PLAN' and 'GRAND VALLEY STATE'. The 'GRAND VALLEY STATE' plan is selected, and its 'Quick Links' dropdown menu is open. The 'Change Investments' option is circled in red. Other options in the dropdown menu include Summary, Transaction History, Statements, Contribution Amount, Investment Performance and Research, BrokerageLink, Withdrawals, Rollovers, Bank/Tax Information, Plan Information and Documents, and Personalized Planning & Advice.

Step Three: On this page, select the appropriate option for you. You will be guided through a series of steps to make your investment updates.

GRAND VALLEY STATE (50094)

Summary Contributions Investments Withdrawals Rollovers Bank/Tax Information Plan Information

PERFORMANCE & RESEARCH INVESTMENT STRATEGIES PERSONALIZED PLANNING & ADVICE **CHANGE INVESTMENTS** BROKERAGELINK®

Future Investments



Change Investment Elections
 Choose where your plan contributions will be invested.

Current Investments



Exchange ONE Investment
 Swap one investment for another.



Exchange MULTIPLE Investments
 Get the investment mix you want and rebalance holdings in a single transaction.

[Pending Exchanges](#)

Step Four: Please note, you will have a variety of sources for which you must designate investment elections. A source is the origin of your money in your retirement plan, or where your money comes from. Examples of sources include: Employee Contribution (the money you contribute), Employer Contribution (the money your employer may contribute), and Rollover money (the money that you may have rolled over into this plan from a prior employer's qualified retirement plan).

You have the flexibility to select different investment holdings and percentages for your different sources. Or, you can simply choose to invest your sources the same way.

Please reference the following example for help in making your selections.

BENEFITS & WELLNESS GRAND VALLEY STATE UNIVERSITY HUMAN RESOURCES

Powered by **Fidelity**

GRAND VALLEY STATE UNIVERSITY Log Out

Change Your Investment Elections

i Your plan's default investment percentages for these percentages before completing your future investment elections.

This informational box will provide details related to your source options.

Learn About Investing

- How to invest your contributions.
- What is a source?

Click here to learn more about sources.

Changes you make below are applied to all of your sources **individually**.

Or, you can choose to invest your sources the same way.

If you'd rather not make updates to each individual source, you can click here to invest your sources the same way.

Choose Your Investment Elections

Source: EMPLOYER CONTRIBUTION

Change your investment elections for this source:

Select Go

Asset Class	Subclass	Fund Name	Current %
Total: 100%			

Source: 403(B) ROLLOVER

Change your investment elections for this source:

Select Go

Asset Class	Subclass	Fund Name	Current %
Total: 100%			

Source: EMPLOYEE VOLUNTARY

Change your investment elections for this source:

Select Go

Asset Class	Subclass	Fund Name	Current %
Total: 100%			

Source: AGE 50 CATCH UP

Change your investment elections for this source:

Select Go

Asset Class	Subclass	Fund Name	Current %
Total: 100%			

The funds you selected and the percentages will display here.

Examples of the different sources for which you must choose your investment elections. For example: EMPLOYER CONTRIBUTION and EMPLOYEE VOLUNTARY.

The screenshots above provide one example of how to update your investment elections for the different sources within your plan. The screenshots are intended to be illustrative only. For example, the Age 50 Catch-up source may not be applicable to you.

If you have questions or need further assistance, please call Fidelity Investments at **1-800-343-3548**.

Please note: If you are making investment elections within your **TIAA** account, you will need to **contact TIAA directly** to change your investment elections. While making updates to your account, please remember to ensure your beneficiaries are up to date. If you have holdings with both Fidelity and TIAA you will need to designate a beneficiary with each provider separately.

Investing involves risk, including risk of loss.

Screenshots are for illustrative purposes only.

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