online enrollment guide

Enrolling in your Northwestern University Retirement Plan with Fidelity Investments is now more convenient, with a simple online process that can be completed in 15 minutes or less! Northwestern University and Fidelity Investments have teamed up to use technology that lets you set up an account with Fidelity, select and invest contributions, and designate beneficiaries for your plan account from anywhere, at virtually any time, involving little or no paperwork.

To simplify your enrollment, have the following information before logging on:

- Plan ID Number: **56005** Northwestern University 403(b) Retirement Savings Plan
- Personal information: *Social Security number, address, and date of birth.*
- Investment option choices: *A complete listing of the investment options will be available for your review during the enrollment process.*
- Beneficiary(ies) and information about them: *You will need the date of birth and mailing address for each beneficiary. If you designate a trust as a beneficiary, you will need the name of the trust, the date it was created, the name of the trustee, and the tax identification number, if any, of the trust.*

Take this very important step now and begin contributing to your retirement!

Please note that your enrollment in the Retirement Plan is not complete until you both enroll in the plan using the University's online enrollment tool and establish an investment company account.

Step 1 Enroll in the Retirement Plan

- Go to the online enrollment tool, eBenefits at **www.benefits.northwestern.edu**
- Complete your election for the Basic and Supplemental Retirement Plans

Step 2 Set Up a Fidelity Account®

- From eBenefits, click on the link to the Fidelity online enrollment site: **http://enrollonline.fidelity.com**
- Once linked to Fidelity's online enrollment site, simply follow the prompts
- You will be notified when you have completed your Fidelity enrollment

Step 3 Confirm Your Enrollment at Fidelity

- 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

See the reverse side for additional important information.

Step 4 Designate Your Beneficiary(ies)

Naming beneficiaries for your account at Fidelity is critical. Fidelity NetBenefits® provides you with an easy, online approach to designating this important plan information. Select "Access My Account" at the bottom of the Confirmation screen. This will link you directly to NetBenefits.℠ Simple instructions are provided by the site to guide you through New User Registration, setup of your personal identification number (PIN), and Beneficiary Designation.

Once you have registered with NetBenefits,℠ you can also take advantage of educational tools, make transactions in your account, and review investment information.

If you have any questions

Call a Fidelity Retirement Services Specialist at 1-800-343-0860, Monday through Friday, from 7:00 A.M. to 11:00 P.M. CT. Our Specialists can answer your questions and help you complete the steps necessary to enroll on line or begin directing your investments through your workplace savings plan.

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

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 for a free prospectus. Read it carefully before you invest.

Unless otherwise noted, transaction requests confirmed after the close of the market, normally 3:00 P.M. CT, or on weekends or holidays, will receive the next available closing prices.

Fidelity INVESTMENTS

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