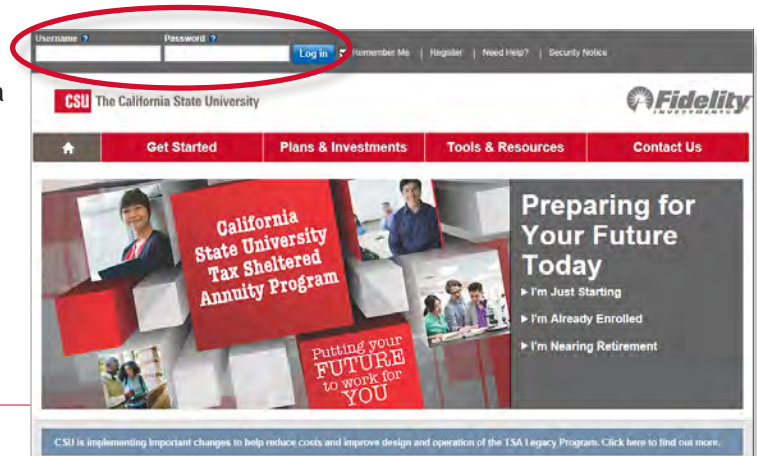




Choosing California State University Tax Sheltered Annuity Program Investments in the Early Choice Investment Election Window

If at any point during this process you have questions or would like support, please call **800-343-0860** or go to www.netbenefits.com/calstate to schedule an appointment with a Fidelity representative.

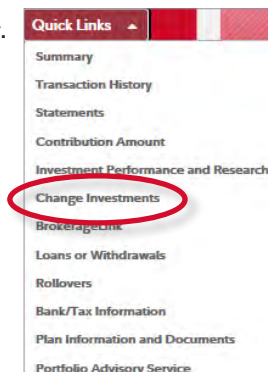
1. From April 23 to May 17, 2018, log in to your Fidelity NetBenefits® account at the very top of the California State University Tax Sheltered Annuity Program website at www.netbenefits.com/calstate. If you have not yet established login information with Fidelity, see the document titled *Enrollment Flyer* to get started. This document can be found at www.netbenefits.com/calstate under *Tools & Resources*, then *Forms & Documents*.



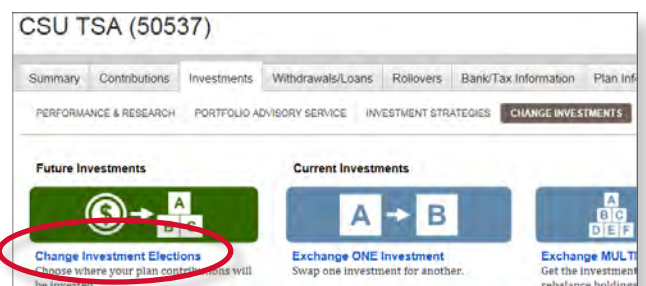
2. After logging in to your NetBenefits® account, select the Quick Links drop-down menu for the *California State University Tax Sheltered Annuity Program* (Plan #50537 - CSU TSA).



3. Select *Change Investments*.



4. Select *Change Investment Elections*.



5. Select "Select Funds" under *Choose your own investments*.

Note: If you are currently enrolled in Fidelity® Portfolio Advisory Service at Work (PASW) you will not have the option to Change Investments. Assets transferred over from the legacy vendors will be included in the service via a reallocation the day after the assets post to your account.

CSU TSA (50537)

Summary Contributions Investments Withdrawals/Loans Rollovers

PERFORMANCE & RESEARCH PORTFOLIO ADVISORY SERVICE INVESTMENT STRA

Investment Elections

Your Current Investment Elections

For any future contributions that you make, your money will be invested in your current elections, shown in the table below. Your contributions are invested by source, with different fund choices and percentages applied to each of the following:

- Regular 403b
- Roth 403b
- EARLY CHOICE ELECTION

Change Your Investment Elections

If you would like your future contributions to be invested differently, choose one of the options available below.

Help me manage my investments

Target Date Fund
Over time, Target Date Funds automatically invest more conservatively as you approach your retirement date and beyond. Keep in mind, the value of your investment will fluctuate over time, and you may gain or lose money.
[View available target date funds](#)
Select Target Date Fund

Fidelity® Portfolio Advisory Service at Work
Take the time and stress out of managing your own investments with access to a team of professionals that will help you create a plan and stay on track to retirement.
[More about Fidelity® Portfolio Advisory Service at Work](#)
Select Account Management

I'll manage on my own

Choose your own investments
Take control of your portfolio and choose your investments from a list of available funds. These investments will fluctuate over time and you may gain or lose money.
[View list of funds](#)
Select Funds

6. Under *Source: EARLY CHOICE ELECTION*, select *Change investment elections for this source* from the drop-down box and click *Go*.

Change Your Investment Elections

Your plan's default investment percentages for Regular 403b and Roth 403b are prefilled below. You can make changes to these percentages before completing your future investment elections.

Learn About Investing

- [How to invest your contributions.](#)
- [What is a source?](#)

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

Or, you can choose to [invest your sources the same way](#).

Choose Your Investment Elections

Source: Regular 403b
Includes: SALARY REDUCTION, PRE-TAX EMPLOYER TRANSFER, AFTER-TAX TRANSFER, ROLLOVER-403(B), ROLLOVER-401(A), ROLLOVER-457(B), ROLLOVER-AFTER TAX, ROLLOVER IRA
Change your investment elections for this source:
Select [] Go

Asset Class	Subclass	Fund Name	Current %
Blended Investments	--	VANG INST TR 2025	100%
			Total: 100%

Source: Roth 403b
Includes: ROTH BASIC, ROTH ROLLOVER, ROTH IN-PLAN CONVERSION
Change your investment elections for this source:
Select [] Go

Asset Class	Subclass	Fund Name	Current %
Blended Investments	--	VANG INST TR 2025	100%
			Total: 100%

Source: EARLY CHOICE ELECTION
Change your investment elections for this source:
Select [] Go

No Current Election

[Next >](#)

Screenshots are for illustrative purposes only.

Investing involves risk, including risk of loss.

Target Date Funds are an asset mix of stocks, bonds and other investments that automatically becomes more conservative as the fund approaches its target retirement date and beyond. Principal invested is not guaranteed.

Fidelity® Portfolio Advisory Service at Work is a service of Strategic Advisers, Inc., a registered investment adviser and a Fidelity Investments company. **This service provides discretionary money management for a fee.**

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