CSU TSA Enrollment Flyer

Enroll in your California State University Tax-Sheltered Annuity Program with Fidelity Investments.

ENROLL IN 3 EASY STEPS!

STEP 1: Enroll with Fidelity Investments.

1. Go to **www.NetBenefits.com/calstate** and click on "Enroll sign up now".
2. Enter your SSN and plan ID: 50537
3. Provide us with your personal information and custodial consent.

STEP 2: Establish a username and password

If you are logging on for the first time, you will need to establish a username and password. If you already have a Fidelity.com or NetBenefits® account, you may log in using your existing username and password.

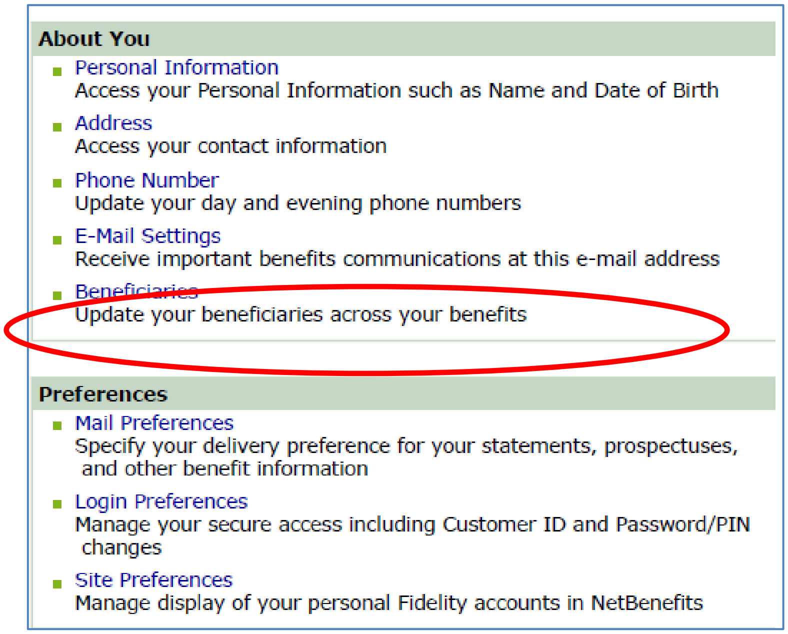
1. Go to **www.NetBenefits.com/calstate**.
2. Click ***Register*** at the top of your screen.

3. **Verify** your identity by entering:
    - The last 4 digits of your Social Security number
    - First Name
    - Last Name
    - Date of birth
4. **Create a Username**. Your username can be your Social Security number; however, to better protect your account, we strongly recommend that you create a unique username. Once you create a username, you cannot revert to your Social Security number.
5. **Create a Password.** Your password protects your account from unauthorized users. A strong password is one that is between 15 and 20 characters, has a mix of case sensitivity, numbers, letters, and special characters.
Your password should *not* be personally identifiable information, such as your Social Security number, telephone number, or date of birth.
6. **Create a Security Question**. If you ever forget your password, you can reset it after Fidelity verifies your identity using your new or updated security question and answer.
7. **New User Registration Confirmation**. If you have other accounts you access via Fidelity.com, NetBenefits®, or eWorkplace®, your new log in information applies to these accounts, as well as to accessing your account by phone.
8. **Enroll in Plan**: Make decisions about contribution amounts and investments.

STEP 3: Establish Your Beneficiaries.

Please make sure to assign beneficiaries to your CSU TSA Program account. Once you have named a beneficiary, be sure to review your choices regularly and update them after certain life events, such as marriage, divorce, the birth of a child, or a death in the family.

1. Log on to your account through **www.NetBenefits.com/calstate**.
2. From the home page, click on *Profile*, then *Beneficiaries* in the *About You* section.



3. You will see sections for Primary Beneficiaries and Contingent Beneficiaries. A Primary Beneficiary is your first choice to receive the value of your retirement account. A contingent beneficiary is your second choice to receive the value of your retirement account if the primary beneficiary(ies) is (are) not living at the time of your death. To add one or more of either type of beneficiary, click on the "Add a Primary Beneficiary" or "Add a Contingent Beneficiary" buttons.
4. Indicate whether you are married or not by clicking on the "*Edit*" button in the Martial Status box.
5. You may enter a person, estate, organization or trust as a beneficiary. Depending on which you choose, you will be asked to provide additional information.
6. Click the "*Save All*" button in the *Review and save your choices* section.
7. Your beneficiary designations will become effective as soon as you complete the online designation process.

NEED HELP?

Call

800.343.0860 to speak with a Fidelity Representative, Monday through Friday, from 8 a.m. to midnight Eastern time.

Click

NetBenefits.com/calstate for information specific to your CSU TSA Program account.

Visit

Getguidance.fidelity.com to schedule an for a confidential consultation.

Investing involves risk, including risk of loss.

Guidance provided is educational.

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