

PROVIDERS AND SERVICES AVAILABLE TO UT SYSTEM RETIREMENT PARTICIPANTS

SERVICES OFFERED BY EACH PROVIDER												
PROVIDERS	PRODUCTS OFFERED BY EACH PROVIDER	Face-to-face counseling appointment	Discuss UT Retirement Plan Options	Assess employee risk tolerance and retirement goals	Consider outside assets with no advice on those assets	Provide asset allocation models and the list of available company funds	Advice on fund selection	Free financial planning services	Online tools, interactive calculators, & mobile apps	Financial workshops and seminars	Investment fund enrollment	Actively manage company accounts (service fee)
FIDELITY (800) 343-0860 www.fidelity.com/ut	<ul style="list-style-type: none"> • Mutual Funds • Lifecycle Funds • Self-Directed Brokerage Accounts 	YES	YES	YES	YES	YES	YES Online or in person.	YES	YES	YES Online, on campus, & at local Fidelity Investor Centers.	YES Online enrollment or downloadable forms available on our website.	NO
VOYA (866) 506-2199 www.ingretirementplans.com/utexas		YES	YES	YES	YES	YES	YES	YES	YES	YES	YES Online enrollment or downloadable form available at: https://utexas.prepare4myfuture.com	YES Mutual funds only.
LINCOLN (800) 454-6265 *8 www.lfg.com/ut	<ul style="list-style-type: none"> • Annuities • Mutual Funds • Lifecycle Funds • Self-Directed Brokerage Accounts 	YES	YES	YES	YES	YES	YES	YES Receive retirement analysis at no cost from local Retirement Consultants.	YES	YES Online or in person.	YES Online enrollment or downloadable forms available on our website.	NO
TIAA-CREF (800) 842-2776 www.tiaa-cref.org/utexas		YES On campus or at our local offices.	YES On campus or at our local offices.	YES Services and tools are available online, by phone, or in person.	YES The advice tool/service considers outside assets, which can also be tracked on the participant website.	YES Objective advice and allocation recommendations available online, by phone, or in person.	YES Objective advice available online, by phone, or in person.	YES Full Financial and Wealth Planning services at no additional cost.	YES	YES Online or in person.	YES Online enrollment form available on our website.	YES
VALIC (800) 448-2542 www.valic.com/utsystem		YES By on-staff VALIC financial advisor.	YES	YES Educational materials and financial analysis online or in person.	YES Online aggregator helps track assets. Rollover help on request.	YES Allocation modeling and investment planning online or in person.	YES Online or in person.	YES Receive retirement analysis at no cost from on-staff advisor.	YES	YES Online or in person.	YES Easy enrollment online or with a VALIC financial advisor.	YES