## PROVIDERS AND SERVICES AVAILABLE TO UT SYSTEM RETIREMENT PARTICIPANTS

<table>
<thead>
<tr>
<th>PROVIDERS</th>
<th>SERVICES OFFERED BY EACH PROVIDER</th>
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<tr>
<td><strong>FIDELITY</strong>&lt;br&gt;(800) 343-0860&lt;br&gt;www.netbenefits.com/ut</td>
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</table>
- **PRODUCTS OFFERED BY EACH PROVIDER**
  - Mutual Funds
  - Lifecycle Funds
  - Self-Directed Brokerage Accounts
  - Annuities
  - Mutual Funds
  - Lifecycle Funds
  - Self-Directed Brokerage Accounts
  
  - **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)**
  
  - **Yes**
  - **Yes**
  - **Yes**
  - **Yes**
  - **Yes**
  - **Online or in person.**
  - **Yes**
  - **Yes**
  - **Yes**
  - **Yes**
  - **Online enrollment or downloadable forms available on our website.**
  - **No** |
| **VOYA**<br>(866) 506-2199<br>www.ingretirementplans.com/utexas | 
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  - **Yes**
  - **Yes**
  - **Yes**
  - **YES**
  - **Online enrollment or downloadable form available at: https://utexas.prepare4myfuture.com**
  - **Yes** |
| **LINCOLN**<br>(800) 454-6265 *8<br>www.lfg.com/ut | 
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  - **Yes**
  - **Yes**
  - **Yes**
  - **Yes**
  - **Yes**
  - **Yes**
  - **Yes**
  - **Online enrollment form available on our website.**
  - **No** |
| **TIAA**<br>(800) 842-2776<br>www.tiaa.org/public/tcm/utexas/home | 
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  - **Yes**
  - **Yes**
  - **Yes**
  - **Yes**
  - **Online enrollment form available on our website.**
  - **Yes** |
| **Corebridge Financial**<br>(800) 448-2542<br>https://www.corebridgefinancial.com/rs/utsystem | 
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  - **Yes**
  - **Yes**
  - **Yes**
  - **Yes**
  - **Yes**
  - **Yes**
  - **Yes**
  - **Yes**
  - **Easy enrollment online or with a Corebridge financial advisor.**
  - **Yes** |