



YOUR RETIREMENT PLAN

Changes to 403(b) Investment Options

Emory is making some important changes to the [investment options](#) in your 403(b) Retirement Plan. Here are some actions you may want to take.

Actions You May Want to Take

- **Review the New Investments**
Review the [new investment options](#) that have been added. Detailed information about all of the funds can be found at: www.hr.emory.edu/403bchanges.
- **Review the Mapping Charts**
Review the fund [mapping charts](#) to learn how your investment options will automatically change to the new investments on November 1, 2021. If you do not wish to have your funds automatically mapped, you can move them yourself starting today. Making changes is entirely **optional**, but you should do it before 4 p.m. ET, October 31, 2021, or your funds will be mapped. If you wish to make changes later, you can always do so. The mapping charts and the instructions for moving your money can be found on the website.
- **Attend a Webinar.**
October 8, 2021 - 2:00 p.m. Zoom link:
<https://emory.zoom.us/j/91309872929?pwd=NUdINIFFMXk3eDEvend0dGhEMGZjUT09>

October 14, 2021 - 12:00 noon Zoom link:
<https://emory.zoom.us/j/96641074305?pwd=OTMrK3dkeVBzdmd5VFRJbnV4L0JiZz09>

- **Schedule a Retirement Counseling Session**

If you need more information about the changes to your investments, you can [contact your retirement vendor\(s\)](#) to schedule a one-on-one retirement counseling session with them.

- **Review your Beneficiary(ies)**

Review your beneficiary designations for each plan account and update your beneficiaries as necessary. [View instructions.](#)

ACTION IS NOT REQUIRED

If you are happy with the new fund lineups and the movement of your current investments into the new lineups, everything will occur without any action on your part. **You do not need to do anything, unless you want to.** On November 1, many of the current funds will be eliminated and those accumulated balances will be mapped to one of the new funds. If you wish to make changes on your own, instructions for how to move your money can be found [here](#).