

Let's Get Started:

Retirement Plan Redesign Checklist

- Review your **current funds** and how they will be mapped to the new investment line up in January 2019

Decision points:

- Move current account balances** to Fidelity and invest in the new investment lineup before January
- Consult with a Fidelity representative** if you are considering an optional self-directed brokerage account
- No action:** allow current balances to transfer automatically in January 2019 based on the mapping strategy

- Decide what to do with **future contributions**

Decision points:

- Select investments** from the new investment lineup at Fidelity ([fidelity.com/duke](https://www.fidelity.com/duke))
- Update payroll deductions** through Retirement Manager at hr.duke.edu/retirementmanager
- No action:** future contributions will be automatically directed to Fidelity and invested in the appropriate age-based Vanguard Target Date Fund in January 2019

- Update your Beneficiary Designations

- Designations on file with TIAA, VALIC and Vanguard will not transfer to your Fidelity account. Update beneficiary designations at [fidelity.com/duke](https://www.fidelity.com/duke)

Questions & Resources

Set up an appointment with a Fidelity representative to talk through your questions by calling 1-800-823-0172 or visit [fidelity.com/reserve](https://www.fidelity.com/reserve)

For more information hr.duke.edu/retirementredesign