

Retirement Savings Plan Tune-up Checklist

- Set Up Your Online Account Access with TIAA and/or Fidelity**
- Update Your Beneficiary**
- Review Your Personal Information**
- Calculate How Much You Need to Save**
- Re-balance Your Portfolio**
- Save More with the 403(b) SRA and/or 457(b)**
- Meet with TIAA and/or Fidelity Investments Retirement Specialists**

TIAA
1-800-732-8353

U-M Microsite
tiaa.org/umich/

Fidelity Investments
1-800-642-7131

U-M Microsite
www.netbenefits.com/uofm