

## SUMMARY

Retirement Manager allows LSU employees to start/change paycheck contributions to the 403(b) supplemental retirement plan. This job aid will assist in creating an account with Retirement Manager as well as changing your paycheck contributions.



If you are setting up a new 403(b) account, you will also need to create an account with your new Investment Provider to choose your investments and designate beneficiaries. **Corebridge, Fidelity, and TIAA** are the active investment providers for the LSU 403(b) plan.

## ACCOUNT SETUP

Go to the **Retirement Manager website** at [www.myretirementmanager.com](http://www.myretirementmanager.com). You can also access the website from the LSU HRM retirement website at [lsu.edu/retirement](http://lsu.edu/retirement). If you have any issues, contact the **Retirement Manager Support Line** at **1-866-294-7950**.

1. On the Retirement Manager website, click **Login** in the top right corner. Under Participants, click **Login**.
2. On the Sign In screen, click "**First Time User? Get Started**" located under the Sign In button.
3. If prompted to verify your employer, use the search box to type "**LSU**" and select your LSU campus from the list. Click **Next**.
4. Fill in your personal information.
  - a. Enter **Last Name**.
  - b. Enter **Birthdate**.
  - c. Enter **Social Security Number**.
5. Click **Continue**.
6. You will then be prompted to **Create Profile**.
  - a. Enter your preferred **Username**.
  - b. Enter your **Email Address**.
  - c. Enter your **Email Address** again to confirm.
  - d. Create a **Password**. *Please note the site's password requirements.*
  - e. Enter your **Password** again to confirm.
  - f. Click **Continue** (or cancel if you do not wish to proceed).
7. Verify your **Email Address**.
  - a. A code will be sent to the email address you provided to enter the site. *Note: if you do not receive an email, check your Junk and/or Spam folder(s). You can also click "Resend Email" to have another code sent.*
8. Once your email address is verified, you will be prompted to enter your **Phone Number** as part of their security and recovery process.
  - a. Check the box next to "**Text me an authentication code**" and click **Continue**.
  - b. Enter the **code** that was received and click **Submit**.
9. You will then be prompted to review the **Terms of Use**. Once reviewed, click "**I Agree**" to proceed to the site.

## START CONTRIBUTIONS



For a **new account**, use the “**To Complete Your Request**” section to set up an account with your chosen Investment Provider if you have not already done so. Click Investment Provider Contacts > Investment Provider's name > Online Enrollment link. Online enrollment links and financial advisor contact information can also be found on the [LSU Supplemental Retirement webpage](#).

## CHANGE CONTRIBUTIONS

From the **Retirement Manager homepage**:

1. Select “**Change Contributions**” from the drop down menu.
2. Select “**Board of Supervisors LSU and A&M College 403b Plan**” from the drop down menu.
3. Select the **pay date** you would like your contribution change to begin. *Note: For 9 month employees, contributions will only be deducted from your 9 regular paychecks and any summer research payments.*
4. Click **Next**.
5. Make the **necessary change(s) to your contributions**.



- There are **two different sections** for contribution changes.
- **Pre-Tax** contributions are deducted before your paycheck is taxed.
  - **After-Tax (Roth)** contributions are deducted after your paycheck is taxed.
- You can contribute to one or both options.

6. Identify the type of contribution (**Pre-Tax** or **After-Tax**) you wish to make changes to.
7. Select the type of contribution change (**Ongoing Contribution** or **Stop Contributing**) from the drop down menu.
8. Enter contribution amount by **dollar amount** OR by **percentage** in the appropriate column next to the investment provider of your choice.
  - i. **Enter the total amount you wish to contribute**, not the difference from previous contribution amount. For example, if the current contribution is \$50 and you want the new contribution amount to be \$75, you would input \$75 as the contribution amount, not \$25.
  - ii. If the contribution amount entered is **too large** to be covered by your paycheck after all necessary paycheck deductions, no contribution will be deducted from that paycheck. Please consult with your Payroll office if you have questions.
  - iii. The Retirement Manager system will **stop contributions** when an employee **reaches the yearly IRS contribution** limit under the LSU 403(b) plan. The system cannot account for outside employment. If you have contributed to a 403(b) plan at another employer in the same calendar year, be sure to account for all outside 403(b) contributions so you do not go over the yearly IRS limit.

9. Click **Next**.
10. **Review** the listed changes made to your contributions. For an emailed receipt, enter your email address (Optional).
11. Click **Submit**.
12. Review the **Terms of Agreement**
13. Click **Agree** to authorize the contribution or **Cancel** to cancel the transaction.
14. Click **Print** to obtain a physical copy of your contribution changes.

**NOTE:** *If you first select print, you will still need to click **AGREE** to submit your contribution change.*