

Warner Pacific University Retirement Plan Information

Warner Pacific University offers three 403(b) retirement plan options. There is no waiting period upon hire for employees to participate and vesting is immediate. Employees who enroll in a plan prior to the fifteenth (15th) of the month may begin contributing the following month. The University currently contributes 4.375% when an employee contributes 3% or more of their salary. Following are the three plan options:

Servant Solutions (Church of God) is a church plan that serves ministers, missionaries and lay employees of the church including Warner Pacific University employees. They offer Target Date Fund options, multiple individual mutual fund investment options, and a Fixed-income Option. Servant Solutions provides personalized service including assistance with financial planning.

To enroll: Go to the website www.servantsolutions.org and in the upper right corner of the home page, click on “FORMS”. Then click on “OUR FORMS” and under the “Member Forms” section click on Membership Application to complete the application. There is an electronic fill in version (recommended) or a paper version if you prefer. If using paper please fax the completed form to (765) 642-3942. Submit the Retirement Payroll Deduction form to HR **‘after’ enrollment is complete.** **Contact:** Heidi Lindley hlindley@servantsolutions.org, Carol Bull cbull@servantsolutions.org or info@servantsolutions.org General website: www.servantsolutions.org

VALIC is a leading retirement plan provider for higher education and healthcare institutions, with services that include financial planning, investments, and financial education programs. A local financial advisor is available to meet with employees to discuss personalized financial planning and investment plan options.

To enroll: Contact Michael Harter (local VALIC representative) at 503-310-5012 or Michael.Harter@aig.com, and submit the Retirement Payroll Deduction form to HR **after enrollment is complete.**

Contact: www.valic.com or call 866-544-4968

TIAA-CREF is a leading financial services organization, providing financial advice and investment options for retirement. In 2013, they added a range of new options for the University, providing the opportunity for each contributor to customize a portfolio. TIAA-CREF offers personalized investment advice at no additional cost.

To enroll: Plan participants must enroll online at www.tiaa-cref.org/myretirementplan. An access code is required when enrolling. **This number is 334559; please save this number for future on-line access.** Upon completion of enrollment, submit the Retirement Payroll Deduction form to HR **‘after’ enrollment is complete.** **Contact:** Call 800-842-2888 for enrollment assistance or 800-842-2252 to speak with an investment consultant, or visit the website above.