

# Managing Your Workplace Savings Plan Accounts Online

MANAGING YOUR WORKPLACE SAVINGS PLAN ONLINE IS EASY — SIMPLY FOLLOW THE STEPS BELOW.

## Establish a Username and Password

If you are logging on for the first time, you will need to establish a Username and Password.

1. Go to **www.netbenefits.com**.
2. Click on **Register Now**.
3. Follow the instructions to set up your login information.

## Change your contribution percentage online

Physicians cannot change their PRP Election Request amount outside of the 5-year period. This option is for staff 401k

To change the amount of your payroll contributions into your account online:

1. Log on to your account through **www.netbenefits.com**.
2. From the Home page, click on the **Select Action** link next to your plan name, select **Contribution Amount** from the drop-down menu, then click the **Contribution Amount** link. Enter your new contribution percentage.
3. Confirm your new contribution percentage.
4. If your plan does not allow you to change your contribution online, visit your HR or Benefits department to complete a new Salary Reduction Agreement.

*All contribution amounts must be in whole percentages and changes will become effective with the current or next pay period, or as soon as administratively possible.*

## Change your investment elections online

To change how your future investment elections are invested online:

1. Log on to your account through **www.netbenefits.com**.
2. From the Home page, click on the **Select Action** link next to your plan name, select **Change Investments** from the drop-down menu, then click the **Investment Elections** link.
3. Enter the percentage of your payroll contributions that you wish to direct to each investment option you choose—your selections must add up to 100%.
4. View the online prospectus for each fund in which you are investing.
5. Confirm your investment elections.

*Any contributions to your account made after the effective date of this change will be directed into the investments you select.*

Need help?

### Call.

800-343-0860 to speak with a Fidelity Representative.

### Visit.

Stop by one of our Investor Centers. To find the Investor Center nearest you, visit [Fidelity.com](http://Fidelity.com), select **Customer Service, Contact Us**, then click on **Find an Investor Center**.

*Investor Center products and services are offered beyond your employer-sponsored retirement plan.*

## Rebalance your portfolio online

Over time, some asset classes and funds perform better than others, which can result in the mix of stock funds, bond funds, and/or money market funds changing from what you originally intended. If this happens, you may wish to rebalance your account so that your investments reflect the mix most appropriate for you and your goals.

To rebalance your account online:

1. Log on to your account through **www.netbenefits.com**.
2. From the home page, click on the **Select Action** link next to your plan name, select **Change Investments** from the drop-down menu, then select **Rebalance**.
3. Enter the percentage of the balance in each of your current investment options that you wish to direct to each investment option you choose — your selections must add up to 100%.
4. View the online prospectus for each fund in which you are investing.
5. Confirm your elections.

## Update your mail preferences

Receiving communications by e-mail offers you greater convenience and will help keep you up to date on topics related to your retirement plan.

1. Log on to your account through **www.netbenefits.com**.
2. Go to Your Profile and click on **E-mail Address**. Enter your personal e-mail address.
3. Go to Mail Preferences and E-mail Settings to select which types of communications you wish to receive via e-mail or regular mail.

Turn here®



Unless otherwise noted, transaction requests confirmed after the close of the market, normally 4 p.m. Eastern time, or on weekends or holidays, will receive the next available closing prices.

The investment options available through the plan reserve the right to modify or withdraw the exchange privilege.

Fidelity Brokerage Services LLC, Member NYSE, SIPC  
900 Salem Street, Smithfield, RI 02917

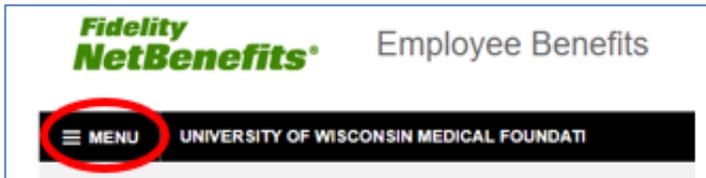
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## UWMF Retirement Plan Beneficiary Designation in Fidelity (NetBenefits)

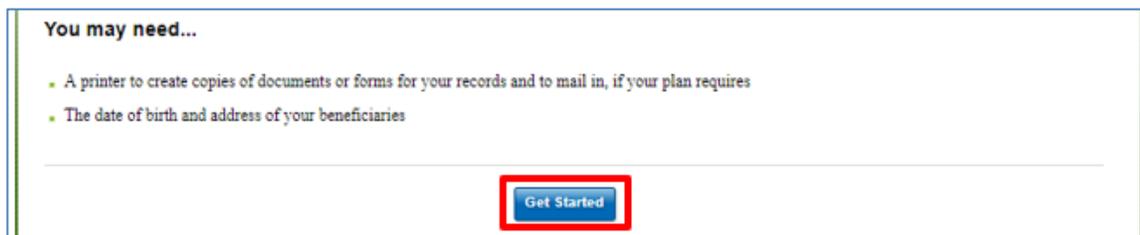
1. Log into [Net Benefits](https://netbenefits.com) (netbenefits.com)
  - a. If you have a Fidelity account, use that username/password
  - b. If you have not setup your account, click on 'Register As a New User' and follow instructions
2. Click on **Menu**



3. Click on **Beneficiaries**



4. Click on **Get Started**



5. Update and verify information as directed
6. You can add as many primary and contingent beneficiaries as you wish to assign.
7. Click **SAVE** to save changes
8. You will receive a confirmation page after you save your choices and finish.

### General Information:

1. Make sure beneficiary percentages equal 100%.
2. WI is a marital property state; it's expected that if you are married a spouse will be listed as the 100% primary beneficiary. If listing someone other than a spouse as primary, a spousal consent would be needed.
3. Beneficiary updates will be effective immediately. Please double check the beneficiaries entered by going back to the beneficiary home page.