

## CSU 403(b) Supplemental Retirement Plan (SRP)

### Transactions Flowchart

What would you like to do?

#### Contribute to a 403(b)

Active  
employee?

Yes

No

Stop - ineligible

If enrolling for the first time, go to [NetBenefits.com/Calstate](https://netbenefits.com/calstate) and click on Enroll  
Existing participants may log in to NetBenefits, to stop, start, or change deductions.

#### Transfer of Eligible Funds

1. From Legacy Vendor to Fidelity
2. From non-CSU employment to Fidelity

Active  
employee?

Yes

Employee contacts Fidelity (800) 343-0860.

#### Take a Loan or Take a Hardship Withdrawal\*

1. Medical expenses
2. Purchase a primary residence
3. Tuition related fees
4. Prevent eviction
5. Funeral expenses
6. Repairs to your home due to theft, fire, storm

Active  
employee?

Yes

Employee contacts Fidelity.

No

Stop - ineligible

#### Cash distribution, or rollover to an IRA or other qualifying plan

At least  
age 59 ½?

Yes

No

Employee contacts approved Legacy Vendor. If Vendor is not listed on the approved Legacy Vendor list below, mail or fax to the Chancellor's Office for signature.

- Ameriprise Financial
- AXA Equitable
- Fidelity
- Lincoln
- National Life Group
- TIAA
- VALIC

No

Active  
employee?

Yes

Stop - ineligible

#### CalPERS Service Credit Purchase

Plan Administrator signature on the Certification Form: Plan to Plan Transfers and Direct Rollovers

Mail  
CSU Chancellor's Office  
Attn: Systemwide Benefits  
401 Golden Shore  
Long Beach, CA 90802  
Or Fax  
(562) 951-4695