The California State University
SYSTEMWIDE HUMAN RESOURCES

CSU 403(b) Supplemental Retirement Plan (SRP)

Transactions Flowchart

What would you like to do?

Contribute to a 403(b)

→ Active employee?
- Yes → If enrolling for the first time, go to NetBenefits.com/Calstate and click on Enroll. Existing participants may log in to NetBenefits, to stop, start, or change deductions.
- No → Stop - ineligible

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 → 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?
  - No → (Employee contacts approved Legacy Vendor…)
  - 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

*Additional documentation will need to be submitted to Fidelity demonstrating need for hardship withdrawal. Approval of hardship withdrawal is determined by Fidelity.

Revised: February 2019