

Services Currently Available to UT System Retirement Plan Participants

		Services available at no cost to the employee						Services available for a fee to the employee		
	Products	In person appointment	Discuss UT Retirement Plan Options	Assess employee risk tolerance and retirement goals	Consider outside assets with no advice on those assets	Provide asset allocation models and the list of available company funds in those models	Suggestion of which company fund(s) to select	Suggestion of which company fund(s) to select	Actively manage company accounts	Enrollment
Fidelity	Mutual Funds Lifecycle Funds Self-Directed Brokerage Accounts	Yes	Yes	Yes	Yes	Yes	Yes	Available at no cost online	No	Forms may be downloaded at: www.fidelity.com/ut .
ING	Annuities Mutual Funds Lifecycle Funds	Yes	Yes	Yes	Yes	Yes	Yes-online only	Yes-In person or at no cost online	Yes-mutual funds only	Online or by downloadable form at: www.ingretirementplans.com/utexas .
Lincoln	Annuities Mutual Funds Lifespan Models	Yes	Yes	Yes	Yes	Yes	Yes	Yes-In addition to comprehensive financial planning	No	Forms may be downloaded at: www.lfg.com/ut .
MetLife	Annuities Mutual Funds Lifecycle Funds	Yes	Yes	Yes	Yes	Yes	Yes	Available at no cost	No	Call 1-800-236-8489 or see www.metlife.com/uts
TIAA-CREF	Annuities Mutual Funds Lifecycle Funds Self-Directed Brokerage Accounts	Yes	Yes	Yes	Yes	Yes	Yes	Available at no cost	Yes	Online from the TIAA-CREF UT site at: www.tiaa-cref.org/utexas .
VALIC	Annuities Mutual Funds Lifecycle Funds Self-Directed Brokerage Accounts	Yes	Yes	Yes	Yes	Yes	Yes	Available at no cost	Yes	You may enroll online at: www.aigretirement.com/utsystem .