Managing Your Account
Make or change your future investment elections

To change how your future investment elections are invested:

1. Log on to your account through www.netbenefits.com/tulaneuniv.
2. From the home page, click the Quick Links drop-down menu next to your plan name, select Change Investments.
3. Then **Change Investment Elections** under Future Investments.
4. On the Investment Elections page, scroll to the bottom of the page. You will be prompted to choose one of two options:

**Target Date Fund**

**Choose your own investments**

---

**Change Your Investment Elections**

If you would like your future contributions to be invested differently, choose one of the options available below.

**Help me manage my investments**

**Target Date Fund**

Over time, Target Date Funds automatically invest more conservatively as you approach your retirement date and beyond. Keep in mind, the value of your investment will fluctuate over time, and you may gain or lose money.

More about target date funds

Retirement Age: 67

Select Target Date Fund

**I'll manage on my own**

Choose your own investments

Take control of your portfolio and choose your investments from a list of available funds. These investments will fluctuate over time and you may gain or lose money.

View list of funds
If you choose Target Date Fund, you will need to select a fund and select “Continue” to view the fund prospectus. Review and submit investment election changes. Select “Submit” to finalize your elections and receive a confirmation page.

**Prospectus Delivery**

You selected to receive prospectuses online and will not receive them by U.S. Mail. You can change your delivery preferences to U.S. Mail by visiting the Mail Preferences area of NetBenefits. You can view these and other prospectuses online at any time by visiting the Plan Literature area of NetBenefits.

**Delivery Options**

<table>
<thead>
<tr>
<th>Fund Prospectus</th>
<th>I’ve received it in the past 30 days</th>
<th>View Now</th>
</tr>
</thead>
<tbody>
<tr>
<td>FID FREEDOM K 2025</td>
<td>[ ]</td>
<td>View</td>
</tr>
</tbody>
</table>

Please select a delivery option for each prospectus.

**Review & Submit Investment Election Changes**

Your changes appear below. To complete your transaction, click Submit. To change your investment elections, click Edit Investment Elections.

**Desired Investment Elections**

<table>
<thead>
<tr>
<th>Asset Class</th>
<th>Subclass</th>
<th>Fund Name</th>
<th>Desired %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blended Investments</td>
<td>--</td>
<td>FID FREEDOM K 2025</td>
<td>100%</td>
</tr>
<tr>
<td>Blended Investments</td>
<td>--</td>
<td>FID FREEDOM K 2030</td>
<td>0%</td>
</tr>
</tbody>
</table>

Total: 100%

When you click Submit, a confirmation page will be displayed, which you may print and save for your records.

Submit
If you choose **Choose your own investments**, you will need to enter a percentage for each fund. Select “Next” at the bottom of the page once you have entered your elections totaling 100%. View the online prospectus for each fund in which you are investing or select to have it mailed to you. Review and submit investment election changes. Select “Submit” to finalize your elections and receive a confirmation page.

**Change Your Investment Elections**

If you would like your future contributions to be invested differently, choose one of the options available below.

*Help me manage my investments*

- **Target Date Fund**
  Over time, Target Date Funds automatically invest more conservatively as you approach your retirement date and beyond. Keep in mind, the value of your investment will fluctuate over time, and you may gain or lose money.

*More about target date funds*

- **Retirement Age:** 67
- **Select Target Date Fund**

*I'll manage on my own*

- **Choose your own investments**
  Take control of your portfolio and choose your investments from a list of available funds. These investments will fluctuate over time and you may gain or lose money.

*View list of funds*

- **Select Funds**
If you choose **Choose your own investments**, you will need to enter a percentage for each fund. Select “Next” at the bottom of the page once you have entered your elections totaling 100%. View the online prospectus for each fund in which you are investing or select to have it mailed to you. Review and submit investment election changes. Select “Submit” to finalize your elections and receive a confirmation page.

**Change Your Investment Elections**

Changes you make below are applied to all of your sources the **same way**.
Or, you can choose to invest your sources differently.

<table>
<thead>
<tr>
<th>Asset Class</th>
<th>Subclass</th>
<th>Fund Name</th>
<th>Current %</th>
<th>Desired %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blended Investments</td>
<td>Large Cap</td>
<td>FID FOUR IN ONE IDX</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Blended Investments</td>
<td>Specialty</td>
<td>FID ASSET MGR 50%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Blended Investments</td>
<td>Large Cap</td>
<td>FID ASSET MGR 85%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Blended Investments</td>
<td>Large Cap</td>
<td>FID STRAT DIV &amp; INC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Blended Investments</td>
<td>Other</td>
<td>FID CONVERTIBLE SEC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Blended Investments</td>
<td>--</td>
<td>FID ASSET MGR 20%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Blended Investments</td>
<td>--</td>
<td>FID ASSET MGR 30%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Select “Next” at the bottom of the page once you have entered your elections totaling 100%. View the online prospectus for each fund in which you are investing or select to have it mailed to you. Review and submit investment election changes. Select “Submit” to finalize your elections and receive a confirmation page.

Prospectus Delivery

You selected to receive prospectuses online and will not receive them by U.S. Mail. You can change your delivery preferences to U.S. Mail by visiting the Mail Preferences area of NetBenefits.

You can view these and other prospectuses online at any time by visiting the Plan Literature area of NetBenefits.

Note: Your browser must be set to allow pop-up windows to view this information.

Delivery Options

<table>
<thead>
<tr>
<th>Fund Prospectus</th>
<th>I've received it in the past 30 days</th>
<th>View Now</th>
</tr>
</thead>
<tbody>
<tr>
<td>FID FOUR IN ONE IDX</td>
<td>○</td>
<td>View</td>
</tr>
</tbody>
</table>

Please select a delivery option for each prospectus.

Review & Submit Investment Election Changes

Your changes appear below. To complete your transaction, click Submit. To change your investment elections, click Edit Investment Elections.

<table>
<thead>
<tr>
<th>Desired Investment Elections</th>
<th>Source: All Eligible Sources</th>
<th>Fund Name</th>
<th>Desired %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blended Investments</td>
<td>Large Cap</td>
<td>FID FOUR IN ONE IDX</td>
<td>100%</td>
</tr>
<tr>
<td>Blended Investments</td>
<td>--</td>
<td>FID FREEDOM K 2030</td>
<td>0%</td>
</tr>
</tbody>
</table>

When you click Submit, a confirmation page will be displayed, which you may print and save for your records.
Reallocate your balance by exchanging one investment fund
To change one of the funds in which your current balance is invested:

1. From the home page, click the *Quick Links* drop-down menu next to your plan name, select *Change Investments*, and then *Exchange ONE Investment*. To Exchange MULTIPLE Investments, follow the steps listed under Rebalance your account.
2. Click on “Start” next to Choose Investment to SELL.
3. Select the investment you would like to sell, along with the specific sources and then the amount you would like to sell. Then click “Continue”.

Exchange One Investment
To exchange investments, first choose the investment to sell and then the one to buy. No sale or purchase will be initiated until you submit the entire exchange order.
4. Click “Begin” next to Choose Investment to BUY.
5. Select the investment you would like to buy. Then click “Continue”.
6. Review the changes for accuracy. If you need to make a change, click “Edit”. If you are ready to complete the exchange, click “Submit This Exchange” and you will receive a confirmation page.
Rebalance your account
To change multiple funds in which your current balance is invested:

1. From the home page, click the Quick Links drop-down menu next to your plan name, select Change Investments, then Exchange MULTIPLE Investments.
2. Click on “Start Your Rebalance”.

**One-Time Rebalance**

Rebalancing is a way to get the investment mix you want without making a lot of individual exchanges. When you rebalance your Investments, you move money among several at one time, resulting in the allocations you choose.

**Additional Rebalance Options**

Once you choose your target allocation, you can sign up to be alerted if your allocations slip from those targets (this is called Rebalance Notification). Fidelity will send you an email alert with a link to NetBenefits to update your allocations.

Alternatively, you can choose to have your account automatically reset to your desired allocations on a regular basis (this is called Automatic Rebalance).
3. Select your source to be rebalanced.

Rebalance: Source Selection

You can choose the source(s) for your rebalance. A source refers to the origin of the money in your account.

Examples of sources include: employee contribution (the money you contribute), company match (the money your employer may contribute), and rollover money (the money that you may have rolled over into this plan from a prior employer's qualified retirement plan or an IRA).

Select the source(s) you wish to use

<table>
<thead>
<tr>
<th>Source</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Eligible Sources</td>
<td>Rebalance All Sources</td>
</tr>
<tr>
<td>Single Sources</td>
<td>Choose a Single Source</td>
</tr>
</tbody>
</table>

You are about to move your existing balances. This will not affect how future contributions will be invested.

Important: Please read the Terms of Use

Important things to know about excessive trading
4. Enter your desired percentages. The total must equal 100%. Click “Begin Rebalance” when ready to proceed.
5. Select your rebalance option, and then click “Next”.

Rebalance: Choose Your Allocation

Source: All Eligible Sources
When you rebalance, you can change how your entire account is invested. Below, you can see your current allocation, and make changes.

For each investment, indicate the allocation you want in the Desired % column. Your choices must add up to 100%.

<table>
<thead>
<tr>
<th>Investments</th>
<th>Current Balance</th>
<th>Current %</th>
<th>Desired %</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Stock Investments</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Large Cap</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FID BLUE CHIP GR K</td>
<td>$0.00</td>
<td>0.00%</td>
<td>0.0%</td>
</tr>
<tr>
<td>FID BLUE CHIP VALUE</td>
<td>$0.00</td>
<td>0.00%</td>
<td>0.0%</td>
</tr>
<tr>
<td>FID CAP APPREC K</td>
<td>$0.00</td>
<td>0.00%</td>
<td>0.0%</td>
</tr>
<tr>
<td>FID CONTRAFUND K</td>
<td>$0.00</td>
<td>0.00%</td>
<td>0.0%</td>
</tr>
<tr>
<td>FID DISCIPLN EQ K</td>
<td>$0.00</td>
<td>0.00%</td>
<td>0.0%</td>
</tr>
<tr>
<td>FID DIVIDEND GR K</td>
<td>$0.00</td>
<td>0.00%</td>
<td>0.0%</td>
</tr>
<tr>
<td>FID EQ DIV INCOME K</td>
<td>$0.00</td>
<td>0.00%</td>
<td>0.0%</td>
</tr>
<tr>
<td>FID EQUITY INCOME K</td>
<td>$0.00</td>
<td>0.00%</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

Note: You are about to move your existing balances. This will not affect how future contributions will be invested.

Important things to know about excessive trading.
6. Confirm you have received or reviewed the prospectuses of any new investments. Click “Continue” to confirm the rebalance.

7. Review the changes for accuracy. If you need to make a change, click “Cancel Rebalance”. If you are ready to complete the exchanges, click “Submit” and you will receive a confirmation page.