The University of Texas System
RETIREMENT PROGRAM
Your Future. Your Choice.

PROVIDERS AND SERVICES AVAILABLE TO UT SYSTEM RETIREMENT PARTICIPANTS

		SERVICES OFFERED BY EACH PROVIDER										
PROVIDERS	**PRODUCTS OFFERED BY EACH PROVIDER**	Face-to-face counseling 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	Advice on fund selection	Free financial planning services	Online tools, interactive calculators, & mobile apps	Financial workshops and seminars	Investment fund enrollment	Actively manage company accounts *(service fee)*
FIDELITY (800) 343-0860 www.netbenefits.com/ut	•Mutual Funds •Lifecycle Funds •Self-Directed Brokerage Accounts	**YES**	**YES**	**YES**	**YES**	**YES**	**YES** Online or in person.	**YES**	**YES**	**YES** Online, on campus, & at local Fidelity Investor Centers.	**YES** Online enrollment or downloadable forms available on our website.	**NO**
VOYA (866) 506-2199 www.ingretire-mentplans.com/utexas	Annuities •Mutual Funds •Lifecycle Funds	**YES**	**YES**	**YES**	**YES**	**YES**	**YES**	**YES**	**YES**	**YES**	**YES** Online enrollment or downloadable form available at: https://utexas.prepare4myfu-ture.com	**YES** Mutual funds only.
LINCOLN (800) 454-6265 *8 www.lfg.com/ut	•Annuities •Mutual Funds •Lifecycle Funds •Self-Directed Brokerage Accounts	**YES**	**YES**	**YES**	**YES**	**YES**	**YES**	**YES** Receive retirement analysis at no cost from local Retirement Consultants.	**YES**	**YES** Online or in person.	**YES** Online enroll-ment or down-loadable forms available on our website.	**NO**
TIAA (800) 842-2776 www.tiaa.org/public/tcm/utexas/home	•Annuities •Mutual Funds •Lifecycle Funds •Self-Directed Brokerage Accounts	**YES** On campus or at our local offices.	**YES** On campus or at our local offices.	**YES** Services and tools are available online, by phone, or in person.	**YES** The advice tool/ service considers outside assets, which can also be tracked on the participant website.	**YES** Objective advice and allocation recommenda-tions available online, by phone, or in person.	**YES** Objective advice available online, by phone, or in person.	**YES** Full Financial and Wealth Planning services at no additional cost.	**YES**	**YES** Online or in person.	**YES** Online enrollment form available on our website.	**YES**
Corebridge Financial (800) 448-2542 https://www.corebridgefinancial.com/rs/utsystem	•Annuities •Mutual Funds •Lifecycle Funds •Self-Directed Brokerage Accounts	**YES** By on-staff Corebridge financial advisor.	**YES**	**YES** Educational materials and financial analysis online or in person.	**YES** Online aggregator helps track assets. Rollover help on request.	**YES** Allocation modeling and investment planning online or in person.	**YES** Online or in person.	**YES** Receive retirement analysis at no cost from on-staff advisor.	**YES**	**YES** Online or in person.	**YES** Easy enrollment online or with a Corebridge financial advisor.	**YES**

ver 6/27/22