

Your PSERS Membership Checklist



Staying informed about your PSERS retirement benefits will help you plan, save, and prepare for retirement.

Register your Member Self-Service account.

The PSERS Member Self-Service (MSS) Portal offers you secure, convenient, 24/7 access to your pension account information. With the MSS Portal, you can conduct many pension plan-related transactions online instantly instead of filling out paper forms or contacting PSERS staff. Visit PSERS online and click *Member Login (MSS)* to get started.

Update your communication preferences.

Keep the lines of communication open. Be sure to keep your email address current with your defined benefit and defined contribution accounts. If you have a PSERS MSS account, you are automatically enrolled in Paperless Delivery. With Paperless Delivery, PSERS will deliver membership information to you electronically instead of through physical mail. You should check your emails for notifications from PSERS to ensure you do not miss important information or deadlines. To manage how you receive updates and correspondence from PSERS, log into your PSERS MSS Account, and select *Communication Preferences*.

Access your PSERS DC account online.

Visit PSERS online to log in to MSS, then click the link inside the Voya Account Access box to go to your PSERS DC account. On your account homepage, the interactive myOrangeMoney® experience will show you how your DC account savings can translate into estimated monthly retirement income*. Input additional information about your PSERS Defined Benefit Plan and other savings accounts to enhance the experience.

Review your PSERS DC account investment options.

In your PSERS DC account, go to *Investments & Research* above the orange dollar bill to learn more about the investment options that are available to you in the Plan. This includes investment and performance information. Learning about the investment options in the PSERS DC Plan will help ensure that you have the right investment vehicle(s) chosen for your saving and retirement planning needs.

Experience Financial Wellness and access helpful information.

In your PSERS DC account, click *Financial Wellness* at the top of the page to take a financial wellness assessment that measures you across the six pillars of financial wellness to help you plan and achieve your financial goals.

On the PSERS website go to Financial Wellness Education for a wide variety of articles and information to help you on your financial journey. There is also a series of videos that will help you learn more about the PSERS DC Plan, the myOrangeMoney experience, investing concepts, and more. Each presentation is available on-demand at any time and will take you fewer than 15 minutes to complete.

Nominate and maintain beneficiaries.

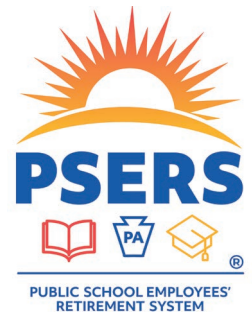
A beneficiary is the person(s) or entity(ies) you wish to receive your death benefits upon your death. You may nominate and change your beneficiary nomination electronically at any time through the MSS Portal. Alternatively, you may submit a *Nomination of Beneficiaries (PSRS-187)* form to PSERS.



Have questions or need assistance?

Call PSERS at **1.888.773.7748** weekdays from 8:00 a.m. to 5:00 p.m. ET for PSERS membership and Defined Benefit Plan questions. Call Voya at **1.833.432.6627** weekdays from 8:00 a.m. to 8:00 p.m. ET, excluding stock market holidays, for PSERS Defined Contribution Plan questions.

With PSERS, you're on your way!



***Important:** The illustrations or other information generated by the calculators are hypothetical in nature, do not reflect actual investment results, and are not guarantees of future results. This information does not serve, either directly or indirectly, as legal, financial or tax advice and you should always consult a qualified professional legal, financial and/or tax advisor when making decisions related to your individual tax situation.

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