

Important!

Now that you've opened an account, make sure you've taken steps to start contributing. It is also important to designate beneficiaries to your account.



I need to fund my 403(b)

If you haven't already done so, you will need to fill out a Salary Reduction Agreement (SRA). The SRA authorizes your employer to withhold the dollar amount or percentage of pay you've elected from each paycheck and send your contribution to Member Benefits. Depending on the district you work for, you will fund your account in one of three ways:

1. Request an SRA from your district.
2. Request an SRA from your district's third-party administrator.
3. Online through the *yourMONEY* portal (only available in certain districts).

Detailed instructions on how to fund your 403(b) can be found at weabenefits.com/yourmoney.



I need to fund my IRA

There are four options available to fund your IRA.

1. Monthly withdrawal from your bank account.
2. Personal check.
3. Transfer or rollover in from an existing account.
4. If you are an employee in a district that uses our Trust Advantage™ program, you may be able to payroll deduct your IRA contributions.

Detailed instructions on how to fund your IRA, including forms to fill out, can be found at weabenefits.com/yourmoney.



I need to add or update beneficiary information

Beneficiaries matter. Named beneficiaries on your retirement account(s) supersede your will. Log into your account at weabenefits.com/yourmoney and click on the "Shortcuts" tab and choose Manage Beneficiaries under Make a Request option. From there you will be able to add or change beneficiary information.

Did you know?

As a Wisconsin public school employee, you are eligible for a free consultation with a financial planner. Member Benefits offers a variety of free* and fee-based** comprehensive financial planning services to suit your needs. Ask us about preferred pricing.

Schedule an appointment today:
weafa@weabenefits.com

Providing personal insurance and retirement and investment services to Wisconsin public school employees and their families for over 45 years.

Retirement and Investments

1-800-279-4030

403(b)
Roth IRA
Traditional IRA
Financial planning services
Personal Investment Account

Personal Insurance:

1-800-279-4030

Auto
Home/Condo
Renters
Flood
Umbrella
Long-term care
Recreational vehicle and toy

If you have questions or need help accessing your account

phone: 1-800-279-4030
e-mail: retirement@weabenefits.com
web: weabenefits.com



Property and casualty insurance programs are underwritten by WEA Property & Casualty Insurance Company. The 403(b) retirement program is offered by the WEA TSA Trust. TSA program registered representatives are licensed through WEA Investment Services, Inc., member FINRA. The Trustee Custodian for the WEAC IRA accounts is Newport Trust Company. All investment advisory services are offered through WEA Financial Advisors, Inc. *Consultation is free; however, if you choose to invest in the WEA Tax Sheltered Annuity or WEAC IRA program, fees will apply. Consider all expenses before investing. Must meet eligibility rules to participate. ** Fee-based service. Must meet eligibility rules to participate. Family members may also be eligible. Call for details. Wisconsin residency required. Fees and services subject to change. Terms controlled by signed service agreement. The Trustee Custodian for the Personal Investment Accounts is Mid Atlantic Trust Company. The Personal Investment Account Program is offered by WEA Financial Advisors, Inc., a registered investment advisor under the WEA Member Benefit Trust.

TSA 4231 280 1118

READ ME.
I'M IMPORTANT.

How to ACCESS *your*MONEY™

take a quick tour

Next Steps:



Log in to your account online through *yourMONEY*



Set up contributions to your 403(b) or IRA



Learn about the features in *yourMONEY*



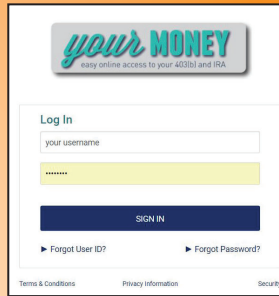
Contact Member Benefits for help



HOW TO ACCESS *yourMONEY*

HOW TO LOG INTO YOUR ACCOUNT ONLINE FOR THE FIRST TIME

STEP 1: Go to weabenefits.com/yourmoney or click on the "Access *yourMONEY*" link from our home page, weabenefits.com.



STEP 2: Log in to your account.

The first time you sign in:

Login ID = your Social Security number
Password = your date of birth (mmddyyyy)

Read and accept terms and conditions

STEP 3: Personalize your login ID and password.

You'll be prompted to enter an email address, a new User ID, and password. Please note the specific password requirements.

New Password Requirements:

- At least 8 characters in length
- At most 50 characters in length
- At least 1 alphabetic character
- At least 1 alphabetic uppercase character
- At least 1 numeric character
- Cannot repeat your previous 3 passwords

A Confirmation of Activity e-mail will be sent to the e-mail address provided.

STEP 4: Enter security questions.

Select two security questions that will allow you to self-service if you forget your user ID or password.

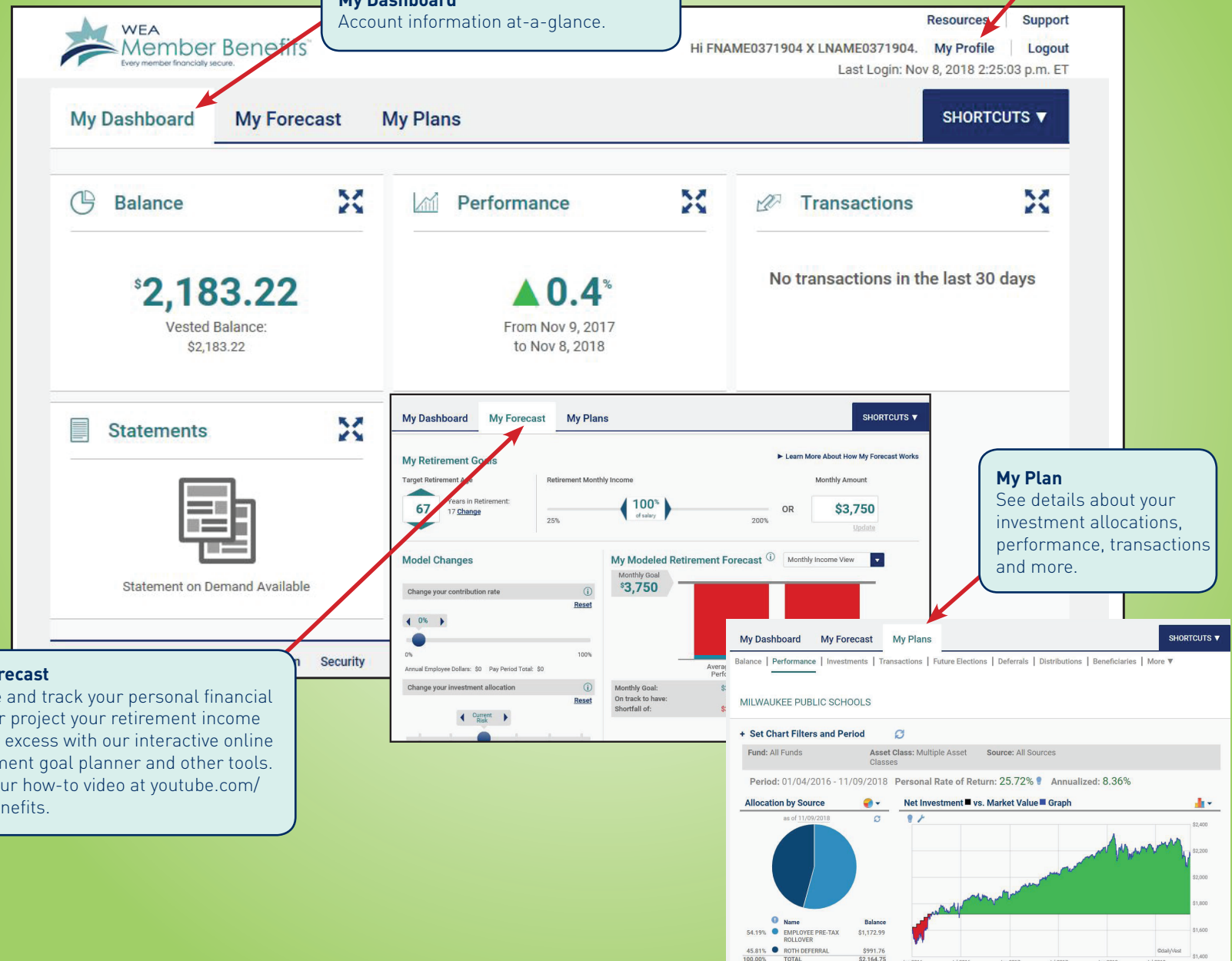
STEP 5: Two-Factor Authentication

Enter a phone number and select how you would like to receive the verification code (text message or phone call). After you log in with your User ID and Password, you may be prompted to enter a one-time verification code that will be sent to the designated phone number.

After authentication, you will be directed to the My Dashboard page

WHAT'S INSIDE *yourMONEY*

My Profile
Review and update personal information (address, phone number), and opt to receive electronic statements.



My Dashboard
Account information at-a-glance.

My Forecast
Create and track your personal financial plan or project your retirement income gap or excess with our interactive online retirement goal planner and other tools. View our how-to video at youtube.com/weabenefits.

My Plan
See details about your investment allocations, performance, transactions and more.

Balance
\$2,183.22
Vested Balance: \$2,183.22

Performance
0.4%
From Nov 9, 2017 to Nov 8, 2018

Transactions
No transactions in the last 30 days

My Retirement Goals
Target Retirement Age: 67
Years in Retirement: 17
Retirement Monthly Income: 100% of salary
Monthly Amount: \$3,750

My Modeled Retirement Forecast
Monthly Goal: \$3,750
On track to have: \$3,750
Shortfall of: \$0

Allocation by Source
Fund: All Funds | Asset Class: Multiple Asset Classes | Source: All Sources
Period: 01/04/2016 - 11/09/2018 | Personal Rate of Return: 25.72% | Annualized: 8.36%

Name	Balance
EMPLOYEE PRE-TAX ROLLOVER	\$1,172.99
NOTH DEFERRAL	\$991.76
TOTAL	\$2,164.75

GO TO: weabenefits.com/yourmoney

yourMONEY provides you with easy online access to your 403(b) or IRA.