



CALIFORNIA STATE UNIVERSITY, FRESNO

Retirement Manager Certification Process and Chancellor's Office Signature

Date: November 30, 2009

To: CSU TSA Participant

Tax Sheltered Annuity (TSA) participants must now log on to Retirement Manager to download the appropriate certificate to process a transaction for a **Loan, Hardship Withdrawal or In-service Contract Exchange** for the following fund sponsors and legacy vendors:

Current Fund Sponsors

- **Fidelity** - Hardship withdrawals and contract exchanges are available. Currently, Fidelity does not offer loans.
- **ING Life and Annuity** - Loans, hardship withdrawals and in-service contract exchanges are available.
- **MetLife** - Loans, hardship withdrawals and in-service contract exchanges are available.
- **TIAA-Cref** - Loans, hardship withdrawals and in-service contract exchanges are available.
- **VALIC** - Loans, hardship withdrawals and in-service contract exchanges are available.

Legacy Vendors

- **Ameriprise Financial** - Loans and hardship withdrawals are available.
- **ING Reliastar** - Loans and hardship withdrawals are available.
- **Jefferson National** - Loans and hardship withdrawals are available.
- **Life Insurance Company of the Southwest (LSW)** - Loans and hardship withdrawals are available.
- **Midland National** - Loans and hardship withdrawals are available.
- **Oppenheimer Funds** - Loans and hardship withdrawals are available.
- **Security Benefit** - Loans and hardship withdrawals are available.
- **Transamerica** - Loans and hardship withdrawals are available.

Retirement Manager Certification Instructions

Please access [Retirement Manager](http://www.myretirementmanager.com) {website:myretirementmanager.com} to initiate and download certificates for in-service contract exchanges, loans and hardship withdrawals, in the following steps:

1. Key in employee unique ID (your SSN #)
2. Create a password (or use the one previously created)
3. Select your campus
4. Key in employee unique ID
5. Key in password
6. Select Disbursement menu
7. Select contract exchange, loan or hardship withdrawal certificate and follow the prompts.
8. Attach the printed certificate to documents required by the fund sponsor and forward to fund sponsor for handling.

Please note: The application for a loan or hardship withdrawal that has a certificate generated from Retirement Manager does not require a signature from the Plan Administrator (Chancellor's Office). The application with the certificate can then be mailed to the 403(b) directly for process.

EXCEPTIONS: The following requests will require a signature from the Chancellor's Office:

- Active employees requesting a CalPERS Service Credit Purchase, Roll over to an IRA or Distribution Request (does not include a Hardship Withdrawal) must obtain a signature from the Chancellor's Office. These requests cannot be processed through Retirement Manager. *See instructions below for obtaining the Chancellor's Office signature.*
- Retired or Separated Employee: Employees who have retired or separated from the University are required to obtain a signature from the Chancellor's Office for these transactions pursuant to the CSU TSA 403[b] plan document and IRS guidelines. Please specify the date of retirement or separation on your document. *See instructions below for obtaining the Chancellor's Office signature.*

Chancellor's Office Signature Request: This process may take up to 10 business days for a signature. Forms must be sent with a self-addressed, stamped envelope to the following address:

Chancellor's Office, The California State University
401 Golden Shore, 4th Floor - Attn: Donelle George
Long Beach, Ca 90802

If you have any questions, please contact Human Resources at (559) 278-2032.

05/2010