

**CSU 403(b) Supplemental Retirement Plan (SRP)**

Transactions Flowchart

What would you like to do?

**Contribute to a 403(b)**

Active employee?

Yes

No

Stop - ineligible

If enrolling for the first time, go to [NetBenefits.com/Calstate](http://NetBenefits.com/Calstate) and click on Enroll  
Existing participants may log in to NetBenefits, to stop, start, or change deductions.

**Transfer of Eligible Funds**

1. From Legacy Vendor to Fidelity
2. From non-CSU employment to Fidelity

Active employee?

Yes

Employee contacts Fidelity (800) 343-0860.

**Take a Loan or Take a Hardship Withdrawal\***

1. Medical expenses
2. Purchase a primary residence
3. Tuition related fees
4. Prevent eviction
5. Funeral expenses
6. Repairs to your home due to theft, fire, storm

Active employee?

Yes

No

Stop - ineligible

Employee contacts Fidelity.

**Cash distribution, or rollover to an IRA or other qualifying plan**

At least age 59 1/2?

Yes

No

Active employee?

Yes

Employee contacts approved Legacy Vendor. If Vendor is not listed on the approved Legacy Vendor list below, mail or fax to the Chancellor's Office for signature.

- Ameriprise Financial
- AXA Equitable
- Fidelity
- Lincoln
- National Life Group
- TIAA
- VALIC

No

**CalPERS Service Credit Purchase**

Plan Administrator signature on the Certification Form: Plan to Plan Transfers and Direct Rollovers

Mail  
CSU Chancellor's Office  
Attn: Systemwide Benefits  
401 Golden Shore  
Long Beach, CA 90802  
Or Fax  
(562) 951-4695

Stop - ineligible