



2026

# RETIREMENT BENEFITS AT-A-GLANCE



# Plan Options

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The University offers **two** retirement plans to eligible employees.

Both plans provide tax-deferred retirement savings.



**Chapman University Tax Deferred  
Annuity (TDA) 403b Plan**  
**Employee Contributions**



**RETIREMENT  
SAVINGS**



**Chapman University Defined  
Contribution (DC) 401a Plan**  
**Employer Contributions**



# Chapman University Tax Deferred Annuity (TDA) 403b Plan

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## EMPLOYEE CONTRIBUTIONS



Contribute **1% – 100%** of your eligible pay, up to annual IRS Limits

- You are eligible **the first of the month following date of hire**
- **Pre-tax** and **Roth after-tax** contributions are available
- Authorized fund sponsors are **TIAA** and **Fidelity Investments**



# Chapman University Defined Contribution (DC) 401a Plan

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## EMPLOYER CONTRIBUTIONS

- You are eligible **the first of the month following date of hire**
- Set up account with **TIAA or Fidelity Investments**
- If you don't make an election, you will be default enrolled into an account with TIAA
- If you desire an account with Fidelity, you must create your own

The Defined Contribution Plan consists of employer contributions in two layers:

- 01 A 3% discretionary employer contribution (no employee contributions are required)
- 02 A 1% to 6% discretionary employer matching contribution (employee contribution to the 403b plan required)

Vesting of employer contributions occurs over a four-year period, 25% per anniversary year.



CHAPMAN  
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# Employer Contributions

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## Defined Contribution (DC) 401a Plan Employer Contributions

EMPLOYEE CONTRIBUTION – 403b	EMPLOYER CONTRIBUTION – 401a
0%	3%
1%	1% match + 3%
2%	2% match + 3%
3%	3% match + 3%
4%	4% match + 3%
5%	5% match + 3%
6%+	6% match + 3%



# How to Enroll

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## Tax Deferred Annuity 403b Plan (Employee Contributions)



1. Visit [www.tiaa.org/public/tcm/chapman](http://www.tiaa.org/public/tcm/chapman) and click “Ready to Enroll” or call **800.842.2252**
2. Complete the [Salary Deferral Election Form](#)



1. Visit [nb.fidelity.com/public/nb/chapman/home](http://nb.fidelity.com/public/nb/chapman/home) and click “Enroll Now” or call **800.343.0860**
2. Complete the [Salary Deferral Election Form](#)

## Defined Contribution 401a Plan (Employer Contributions)

- **You must set up an account with TIAA or Fidelity** (if you don't, you will be defaulted into an account with TIAA)
- Once you set up your account, you are automatically enrolled in the plan the first of the month following date of hire

# Need Help?

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**Stephen Jackson**

Email: [stephen.jackson2@TIAA.org](mailto:stephen.jackson2@TIAA.org)

Office: 310.407.1407

Online: [www.tiaa.org/public/tcm/chapman](http://www.tiaa.org/public/tcm/chapman)



**Gustavo Rivas**

Email: [gustavo.rivas@fmr.com](mailto:gustavo.rivas@fmr.com)

Mobile: 434.372.0882

Online: [nb.fidelity.com/public/nb/chapman/home](http://nb.fidelity.com/public/nb/chapman/home)



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