

How to Enroll

Tax-Sheltered Annuity (TSA) & Wisconsin Deferred Compensation (WDC)

For TSA:

1. Choose a TSA vendor from the list below that best fits your investment philosophy.
 - o List of investments and returns: [UW TSA Investment Returns](#)
 - o Other benefit information is available at: [TSA Information](#)
 - o If you chose a Life Insurance Company, your agent will do the paperwork for you.
 - o If you chose TIAA/CREF or one of the Mutual Fund Companies, call the company, identify yourself as a University of Wisconsin employee and ask for a 403 (b) Start-Up Kit.
2. Complete an Account Application with the TSA Vendor of your choice. Fidelity and TIAA/CREF offer both on-line and downloadable applications. Several vendors offer downloadable (PDF) applications. See below.
3. Complete a Salary Reduction Agreement (SRA) also. The form is fillable online and can be accessed at: [Salary Reduction Agreement](#) Submit the Salary Reduction Agreement to:

UW Madison
Office of Human Resources
21 N Park St, Suite 5101
Madison, WI 53715

Note: An annual fee of \$9.00 will be deducted for participation in the TSA Program.

For WDC:

Contact the Wisconsin Deferred Compensation office for an enrollment kit. The kit contains all of the necessary enrollment information. Wisconsin Deferred Compensation, 5325 Wall Street, Suite 2755, Madison, WI 53718, 1-877-457-9327 or 608-256-6200

TSA Mutual Funds	TSA Life Insurance Companies
<p>Dreyfus Service Corporation Dreyfus Group Retirement Plans 144 Glenn Curtiss Blvd. Uniondale, NY 11556-0144 (800) 358-0910</p> <p>To enroll, you will need the University of Wisconsin "Group No." B550012546</p>	<p>River Source Life Insurance Company (formerly Ameriprise) 575 D'Onofrio Dr., Suite 100 Madison, WI 53719 (877) 640-6894 (608) 833-4437</p>
<p>Fidelity Investments Fidelity Investments P.O. Box 770002 Cincinnati, OH 45277-0090 (800) 343-0860</p> <p>On-line enrollment application To enroll, you will need the University of Wisconsin Plan "ID Number": 82828.</p> <p>Downloadable enrollment application</p>	<p>Lincoln National Life Lincoln Financial Group 406 Science Dr., Suite 100 Madison, WI 53711 (800) 967-2046 (608) 231-2231</p>

[T. Rowe Price](#)

T. Rowe Price Retirement Plan Services

P.O. Box 17479
Baltimore, MD 21298-9014
(800) 492-7670

[On-line enrollment application](#)

Plan No. **60521**

[Downloadable enrollment application](#) (Print and fill out by hand)

or

[Downloadable enrollment application](#) (This one may be filled in online and then printed)

[TIAA-CREF](#)

TIAA-CREF

200 N. La Salle Street, Suite 1600
Chicago, IL 60601
(800) 842-2776

[On-line enrollment application](#)

To begin the process, enter the University of Wisconsin **Access Code of WIA940.**

[Downloadable enrollment application](#)

[CREF prospectus](#)

[Real Estate prospectus](#)

[Wisconsin Retirement System](#)

(Formerly State Teachers Retirement System)

UW employees may make § 403(b) contributions to a pre-tax additional contributions account with the Wisconsin Retirement System. No separate application is required. For additional information access the website. Select 'Wisconsin Retirement System Benefits,' then select 'Additional Contributions.' Contact your department benefits coordinator for a Salary Reduction Agreement. Submit the Salary Reduction Agreement to:

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