

InvestMyself® 403(b)

InvestMyself® 403(b) allows you to take control of your contributions and investment selections on your own as you progress *To and Through Retirement*®.

Key features

Traditional retirement income sources for educators - such as state pensions and social security - often times do not fully replace your income. The NEA Retirement Program is designed to help educators supplement these income sources so you can achieve the retirement you deserve.

- Our educational videos and intuitive online platform let you enroll in about 15 minutes or less
- Traditional or Roth 403(b)(7) accounts available (*depending on your school district's plan options)
- Multiple Vanguard® index funds allow you to diversify your portfolio*
- Get 24/7 access to your account on SecurityBenefit.com or the Security Benefit mobile app

**Diversification does not assure a profit or insure against financial loss.*

The InvestMyself® 403(b) program is an employer-sponsored retirement savings account, available to NEA members. Contributions are made through a reduction in an employee's salary.

An employer may elect to match up to a certain percentage of contributions.

403(B)(7) Option

Employer-sponsored retirement savings account offered by tax exempt organizations, such as schools. Contributions are made through a reduction in an employee's salary

An employer may elect to match up to a

certain percentage of contributions.

Traditional 403(b)(7) Option

- Pre-tax contributions
- Tax-deferred earnings
- Taxable withdrawals

Roth 403(b)(7) Option

- Contributions made after tax
- Tax-free earning and withdrawals
(subject to certain requirements)

**Not all 403(b)(7) plans offer a Roth option*

[Get Started on Your Retirement](#)

At a glance

Product name: InvestMyself® 403(b)

Product type: Mutual Fund

Minimum Purchase: \$1,000 lump sum or \$100 through monthly salary reduction

Account Type(s): 403(b)

Surrender Charges:

Strategy: Mutual Funds; select from 20 options

IRA Option

Individual Retirement Accounts, independent of your employer. Contributions are set and made by individuals as a lump sum on a recurring basis.

Traditional IRA Option

- Contributions may be tax deductible
- Tax-deferred earnings
- Taxable withdrawals

Roth 403(b)(7) Option

- Contributions made after tax
- Tax-free earnings and withdrawals
(subject to certain requirements)

[Download the Fact Sheet](#)

[Compare Product](#)

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Marketing services in respect of InvestMyself 403(b) | IRA are provided by **Security Distributors, LLC**. Security Benefit executes all fund transactions through Matrix Settlement and Clearance Services, LLC (MSCS) omnibus arrangement.

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