

# 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](#)

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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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