How to Enroll in the Duke 457(b) Plan

Please note: If you are currently not participating in the 403(b) Maximum Program Option, you will not be able to enroll in the 457(b) Plan using Retirement Manager. Please contact the Benefits Office for assistance on how to enroll.

**Step 1:** Log on to Retirement Manager at: www.hr.duke.edu//benefits/retirement/manager/

If you are a **returning user**, enter your User ID and password.

If you are a **first-time user**, click on the “I’m a New User” to create a security profile and password. **Please note:** You will need to input your Duke Unique ID without leading zeroes.

**Step 2:** Set up your 457(b) payroll deductions.
From the “My Savings Manager” menu, select “Start or Change my Contributions” and follow the steps.

1. **Select a plan:**
   Select the “457(b) Deferred Compensation Plan” from the drop down list.

2. **Select pay date:**
   The dates listed in this menu are the pay dates available to make contribution changes. You can only make one contribution change per pay date, so if you would like to alter the contribution change for a payroll date, you will need to first delete your pending change. Contribution changes stay in “pending” status until the deadline to make changes. Once that date passes, you will not be able to delete or enter a new contribution change for that pay date.

3. **Enter contribution amount and select your Investment Carrier(s):**
   Following the prompts on the screen, select your type of contribution, enter your contribution amount and select your investment carrier(s).
Select a distribution option and a projected retirement age or date:
When you enroll in the plan, you must select a distribution option and a projected retirement age or date. Your selection can be changed as often as you like as long as it is done within 60 days from the time you separate from service. Click on “next” to continue.

Review your Contribution Change(s):
Carefully review your contribution changes and pay dates. You may use the “Cancel” button to return to the Plan Selection page to restart your contribution change. Once you are satisfied with your changes, click the “Submit” button.

Confirmation:
Your contribution change details can be printed from this page. If you have selected a new investment provider, it is very important to ensure that you have an account set up with that provider to ensure your contributions are directed and invested per your direction. Please see Step 4 below for instructions.

Step 3: Complete your Investment Carrier(s) enrollment form.
If you have started a contribution with a new Investment Carrier, you must establish a new account with that carrier to properly route your contributions. To obtain your investment carrier enrollment form, please visit Duke’s website at: www.hr.duke.edu/benefits/retirement/about/457/

Before you invest in any fund, please consider the investment objectives, risks, charges and expenses. The fee disclosure information which includes fees and services associated with the plan is available at: www.hr.duke.edu//benefits/retirement/performance. You may also obtain a free prospectus by contacting your investment carrier directly.