

Jacksonville University

Jacksonville University Defined Contribution Retirement Plan

Frequently Asked Questions

Today may be a good time to consider the appropriateness of your current investments. You can change your account and contribution allocations before the quiet period begins or when the transition is complete with VALIC.

How can I access my account with VALIC after the quiet period ends?

After the quiet period ends, you can access your account 24 hours a day, seven days a week by simply logging on to VALIC.com or calling 1-800-448-2542 for your account details. This toll-free number can also connect you with a Customer Service Representative available Monday through Friday from 7 a.m. to 8 p.m. (CT). You can also contact your dedicated VALIC financial advisor. Finally, you can use VALIC Mobile Access at my.valic.com/mobility or download the VALIC Smartphone App for account access at your fingertips.

Do I need to complete a new Beneficiary Designation?

In an effort to ensure that updated beneficiary information is on file, we request you complete an electronic Beneficiary

Whom can I contact if I have questions?

If you have questions, please contact a Client Service Representative at 1-800-448-2542 or your local VALIC Financial Advisor as follows:

Bascom Kurtz, Senior Financial Advisor
653 West 8th Street, First Floor
Jacksonville, FL 32209
FINRA Registered Office Number 177206
Office 904-244-8160
Email: bascom.kurtz@valic.com

Catherine Steward, Financial Advisor
653 West 8

Portfolio Manager—there is a fee for this service.

Offers all of the advice and services of Portfolio Advisor, plus it automatically implements the investment advice and provides ongoing asset management

Portfolio Manager is for the uninvolved participant (“do-it-for-me”)

This service is available at an additional cost and is provided through VALIC Financial Advisors, Inc. (“VFA”); please contact your financial advisor for more information

How often will I receive an account statement?

VALIC mails account statements to your address on record no later than 10 business days after the end of each calendar quarter. These account statements include helpful information about your account balance, your investment elections and transaction history for all of your accounts with VALIC. Account statements can also be accessed online at VALIC.com.

These Questions & Answers are intended to provide you with general information on the benefits offered by Jacksonville University. Every effort has been made to provide an accurate summary of such benefits. However, if there is a conflict between the material in these Questions & Answers and the actual plan documents, the plan documents shall control.