

Service Providers

Service Providers maintain member fund allocations, invest funds, send detailed quarterly statements, and forward summary statement information to SURS.

Who to Contact:

SURS

- Changes of address and other personal information.
- Changes in designated beneficiary(ies)
- Coordinating withdrawals
- Combined statement of all Providers

SERVICE PROVIDER

- Choosing your Provider(s)
- Allocation of Investments
- Guidance in allocating investments
- Quarterly statements in its Plan
- Reallocation of contributions

Fidelity Investments

82 Devonshire Street
Boston, MA 02109
800-343-0860

www.netbenefits.com/surs ^[1]

Principal Financial Group

(provider of monthly annuities for Fidelity Investments)

P.O. Box 10478
Des Moines, IA 50306-9906
877-210-5565 ext. 202

www.principal.com/retirement/incomeannuity/surs/ ^[2]

TIAA

730 Third Avenue
New York, NY 10017-3206
888-219-8310

www.tiaa.org/illinois ^[3]

For more detailed information, please consult the [Self-Managed Plan member guide](#) ^[4].

Tags:

SMP ^[5]

Retirement Plans ^[6]

Source URL: <https://www.surs.org/service-providers>

Links

[1] <http://www.netbenefits.com/surs>

[2] <http://www.principal.com/retirement/incomeannuity/surs/index.htm>

[3] <http://www.tiaa.org/illinois>

[4] <https://www.surs.org/sites/default/files/pdfsx/Guide-SMP.pdf>

[5] <https://www.surs.org/tags/smp>

[6] <https://www.surs.org/tags/retirement-plans>