Tip Sheet for Active Employees Enrolling in the Emeriti Plan

1. All eligible employees must call Emeriti to get enrolled in the Emeriti plan. Enrollment is completed by phone only; there will be no forms to fill out.

2. Before you place your phone call and to ease your enrollment process, please compile the following information to have readily available when you place your call.

- Your social security number and birth date
- The social security numbers and birth dates for any eligible spouse or partner and/or dependents you wish to list
- Select the investment fund you wish for your account, notate the corresponding fund number or for the Fidelity Freedom Fund or the Money Market Fund. You will find this information on the front cover of the Prospectus you received in the enrollment packet.
- You will be asked to give a 6-12 digit (no letters) PIN number that will be used in the future as your identification number. Decide what this will be before you call.
- You will be asked to choose one security question from among five (5) questions below. Determine your answer ahead of time and convert the answer to numbers that can be entered on the phone key pad.

The five questions are:
1. What was the first name of your best friend in high school?
2. What is the name of your favorite restaurant?
3. What was the name of your first pet?
4. What was the model of your first car?
5. What was the name of the street you grew up on?

Below is a checklist to fill out and have ready when you enroll in the Emeriti Plan:

My social security number: My date of birth: Residence ZIP code
6-12 digit PIN number (no letters):
Security Question (convert all letters to numbers):
Freedom Fund or Money Market fund number:
Spouse/partner’s social security number:
Spouse/partner’s date of birth:
Eligible dependents social security number:
Eligible dependents date of birth:

The phone number is 1-866-363-7484. Phone lines are open from 8 am to midnight eastern time.

When you call in you will hear the following message:

Thank you for calling the Emeriti Service Center. So that we may respond to your preliminary questions and ongoing enrollment inquiries, you will be presented with four menu options. Please listen carefully to all options so that
we may direct your call appropriately. You can reach a service representative through any of these options.

To enroll choose Option 1 by pressing 1 on your phone or saying 1. You will then be asked to enter or say your social security number. This will allow Emeriti to verify that you are an eligible participant in Carleton’s plan.

Other notes of interest:

If during the enrollment process you run into difficulty making designations or understanding what is desired, simply wait to respond and the call will be diverted to a representative.

The phone center will be closed Thursday, November 23rd and Monday, December 25th. Every other day our business hours are as usual: 8:00 a.m. - 12:00 a.m. EST. Monday - Friday.