

Fund Overview

Below is a brief review of the investment approach and an assessment of each investment option offered in the Self-Managed Plan.

Investment options available through Fidelity	
Fund Name	Ticker/Report
Fidelity Freedom® Index Income Fund - Institutional Premium Class	FFGZX [1]
Fidelity Freedom Index 2005 Fund - Institutional Premium Class	FFGFX [2]
Fidelity Freedom Index 2010 Fund - Institutional Premium Class	FFWTX [3]
Fidelity Freedom Index 2015 Fund - Institutional Premium Class	FIWFX [4]
Fidelity Freedom Index 2020 Fund - Institutional Premium Class	FIWTX [5]
Fidelity Freedom Index 2025 Fund - Institutional Premium Class	FFEDX [6]
Fidelity Freedom Index 2030 Fund - Institutional Premium Class	FFEGX [7]
Fidelity Freedom Index 2035 Fund - Institutional Premium Class	FFEZX [8]
Fidelity Freedom Index 2040 Fund - Institutional Premium Class	FFIZX [9]
Fidelity Freedom Index 2045 Fund - Institutional Premium Class	FFOLX [10]
Fidelity Freedom Index 2050 Fund - Institutional Premium Class	FFOPX [11]
Fidelity Freedom Index 2055 Fund - Institutional Premium Class	FFLDX [12]
Fidelity Freedom Index 2060 Fund - Institutional Premium Class	FFLEX [13]
American Beacon Large Cap Value Plan Ahead Institutional Fund	AADEX [14]
Ariel Fund Institution Class	ARAIX [15]
Fidelity Contrafund Commingled Pool	--
Fidelity Diversified International Commingled Pool	--
Fidelity Growth Company Commingled Pool	--
Fidelity Low-Priced Stock Fund - Class K	FLPKX [16]
Fidelity Puritan Fund - Class K	FPUKX [17]
Fidelity Real Estate Investment Portfolio	FRESX [18]
Managed Income Portfolio Class 2	--

PIMCO Total Return Fund Institutional Class	PTTRX ^[19]
Fidelity 500 Index Fund - Institutional Premium Class	FXAIX ^[20]
Fidelity U.S. Bond Index Fund - Institutional Class	FXSTX ^[21]
Fidelity Extended Market Index Fund - Premium Class	FSEVX ^[22]
Fidelity Global ex U.S. Index Fund - Institutional Class	FSGSX ^[23]
Wells Fargo Small Company Growth Fund - Class R6	WSCRX ^[24]

Investment options available through TIAA	
Fund Name	Ticker/Report
Dimensional Retirement Income Fund - Institutional	TDIFX ^[25]
Dimensional 2005 Target Date Ret Income Fund - Institutional	DRIMX ^[26]
Dimensional 2010 Target Date Ret Income Fund - Institutional	DRIBX ^[27]
Dimensional 2015 Target Date Ret Income Fund - Institutional	DRIQX ^[28]
Dimensional 2020 Target Date Ret Income Fund - Institutional	DRIRX ^[29]
Dimensional 2025 Target Date Ret Income Fund - Institutional	DRIUX ^[30]
Dimensional 2030 Target Date Ret Income Fund - Institutional	DRIWX ^[31]
Dimensional 2035 Target Date Ret Income Fund - Institutional	DRIGX ^[32]
Dimensional 2040 Target Date Ret Income Fund - Institutional	DRIHX ^[33]
Dimensional 2045 Target Date Ret Income Fund - Institutional	DRIIX ^[34]
Dimensional 2050 Target Date Ret Income Fund - Institutional	DRIJX ^[35]
Dimensional 2055 Target Date Ret Income Fund - Institutional	DRIKX ^[36]
Dimensional 2060 Target Date Ret Income Fund - Institutional	DRILX ^[37]
TIAA-CREF Lifecycle Index Income Fund - Institutional Class	TRILX ^[38]
TIAA-CREF Lifecycle Index 2010 Fund - Institutional Class	TLTIX ^[39]
TIAA-CREF Lifecycle Index 2015 Fund - Institutional Class	TLFIX ^[40]
TIAA-CREF Lifecycle Index 2020 Fund - Institutional Class	TLWIX ^[41]
TIAA-CREF Lifecycle Index 2025 Fund - Institutional Class	TLQIX ^[42]
TIAA-CREF Lifecycle Index 2030 Fund - Institutional Class	TLHIX ^[43]
TIAA-CREF Lifecycle Index 2035 Fund - Institutional Class	TLYIX ^[44]
TIAA-CREF Lifecycle Index 2040 Fund - Institutional Class	TLZIX ^[45]

TIAA-CREF Lifecycle Index 2045 Fund - Institutional Class	TLXIX ^[46]
TIAA-CREF Lifecycle Index 2050 Fund - Institutional Class	TLLIX ^[47]
TIAA-CREF Lifecycle Index 2055 Fund - Institutional Class	TTIIX ^[48]
TIAA-CREF Lifecycle Index 2060 Fund - Institutional Class	TVIIX ^[49]
CREF Bond Market Account R3	QCBMIX ^[50]
CREF Equity Index Account R3	QCEQIX ^[51]
CREF Global Equities Account R3	QCGLIX ^[52]
CREF Growth Account R3 (closed to new contributions as of July 2004)	QCGRIX ^[53]
CREF Inflation-Linked Bond Account R3	QCILIX ^[54]
Vanguard Federal Money Market Fund - Investor Class	VMFXX ^[55]
CREF Money Market Account R3	QCMMIX ^[56]
CREF Social Choice Account R3	QCSCIX ^[57]
CREF Stock Account R3	QCSTIX ^[58]
TIAA-CREF Large-Cap Growth Index - Institutional	TILIX ^[59]
TIAA Real Estate Account	QREARX ^[60]
TIAA Traditional Annuity	Report ^[61]

Tags:

[Investments](#) ^[62]

[SMP](#) ^[63]

Source URL: <http://surs.com/fund-overview>

Links

[1] <https://fundresearch.fidelity.com/mutual-funds/summary/315793687>

[2] <https://fundresearch.fidelity.com/mutual-funds/summary/315793679>

[3] <https://fundresearch.fidelity.com/mutual-funds/summary/315793661>

[4] <https://fundresearch.fidelity.com/mutual-funds/summary/315793653>

[5] <https://fundresearch.fidelity.com/mutual-funds/summary/315793646>

[6] <https://fundresearch.fidelity.com/mutual-funds/summary/315793638>

[7] <https://fundresearch.fidelity.com/mutual-funds/summary/315793620>

[8] <https://fundresearch.fidelity.com/mutual-funds/summary/315793612>

[9] <https://fundresearch.fidelity.com/mutual-funds/summary/315793596>

[10] <https://fundresearch.fidelity.com/mutual-funds/summary/315793588>

[11] <https://fundresearch.fidelity.com/mutual-funds/summary/315793570>

[12] <https://fundresearch.fidelity.com/mutual-funds/summary/315793562>

[13] <https://fundresearch.fidelity.com/mutual-funds/summary/315793554>

[14]

https://quotes.fidelity.com/webxpress/ia_basic_quote_frameset.phtml?QUOTE_TYPE=R&SID_VALUE_ID=AA

[15] <https://fundresearch.fidelity.com/mutual-funds/summary/040337842>

[16]

http://quotes.fidelity.com/webxpress/ia_basic_quote_frameset.phtml?QUOTE_TYPE=R&SID_VALUE_ID=FLPH

[17]

http://quotes.fidelity.com/webxpress/ia_basic_quote_frameset.phtml?QUOTE_TYPE=R&SID_VALUE_ID=FPUI
[18] <https://fundresearch.fidelity.com/mutual-funds/summary/316138205>
[19] <https://fundresearch.fidelity.com/mutual-funds/summary/693390700>
[20] <https://fundresearch.fidelity.com/mutual-funds/summary/315911750>
[21] http://quotes.fidelity.com/webxpress/ia_basic_quote_frameset.phtml?QUOTE_TYPE=R&SID_VALUE_ID=FXST
[22] <https://fundresearch.fidelity.com/mutual-funds/summary/315911883>
[23] http://quotes.fidelity.com/webxpress/ia_basic_quote_frameset.phtml?QUOTE_TYPE=R&SID_VALUE_ID=FSG
[24] http://quotes.fidelity.com/webxpress/ia_basic_quote_frameset.phtml?QUOTE_TYPE=R&SID_VALUE_ID=WSO
[25] <https://www.tiaa.org/public/investment-performance/nonpropmutualfunds/profile?ticker=92810768>
[26] <https://www.tiaa.org/public/investment-performance/nonpropmutualfunds/profile?ticker=92810729>
[27] <https://www.tiaa.org/public/investment-performance/nonpropmutualfunds/profile?ticker=92810722>
[28] <https://www.tiaa.org/public/investment-performance/nonpropmutualfunds/profile?ticker=92810734>
[29] <https://www.tiaa.org/public/investment-performance/nonpropmutualfunds/profile?ticker=92810732>
[30] <https://www.tiaa.org/public/investment-performance/nonpropmutualfunds/profile?ticker=92810731>
[31] <https://www.tiaa.org/public/investment-performance/nonpropmutualfunds/profile?ticker=92810730>
[32] <https://www.tiaa.org/public/investment-performance/nonpropmutualfunds/profile?ticker=92810725>
[33] <https://www.tiaa.org/public/investment-performance/nonpropmutualfunds/profile?ticker=92810724>
[34] <https://www.tiaa.org/public/investment-performance/nonpropmutualfunds/profile?ticker=92810723>
[35] <https://www.tiaa.org/public/investment-performance/nonpropmutualfunds/profile?ticker=92810726>
[36] <https://www.tiaa.org/public/investment-performance/nonpropmutualfunds/profile?ticker=92810727>
[37] <https://www.tiaa.org/public/investment-performance/nonpropmutualfunds/profile?ticker=92810728>
[38] <https://www.tiaa.org/public/investment-performance/mutualfunds/profile?ticker=21066463>
[39] <https://www.tiaa.org/public/investment-performance/mutualfunds/profile?ticker=21066484>
[40] <https://www.tiaa.org/public/investment-performance/mutualfunds/profile?ticker=21066498>
[41] <https://www.tiaa.org/public/investment-performance/mutualfunds/profile?ticker=21066480>
[42] <https://www.tiaa.org/public/investment-performance/mutualfunds/profile?ticker=21066486>
[43] <https://www.tiaa.org/public/investment-performance/mutualfunds/profile?ticker=21066495>
[44] <https://www.tiaa.org/public/investment-performance/mutualfunds/profile?ticker=21066477>
[45] <https://www.tiaa.org/public/investment-performance/mutualfunds/profile?ticker=21066474>
[46] <https://www.tiaa.org/public/investment-performance/mutualfunds/profile?ticker=21066478>
[47] <https://www.tiaa.org/public/investment-performance/mutualfunds/profile?ticker=21066492>
[48] <https://www.tiaa.org/public/investment-performance/mutualfunds/profile?ticker=34211326>
[49] <https://www.tiaa.org/public/investment-performance/mutualfunds/profile?ticker=78873873>
[50] <https://www.tiaa.org/public/investment-performance/crefvariableannuity/profile?ticker=268581927>
[51] <https://www.tiaa.org/public/investment-performance/crefvariableannuity/profile?ticker=268561119>
[52] <https://www.tiaa.org/public/investment-performance/crefvariableannuity/profile?ticker=268551676>
[53] <https://www.tiaa.org/public/investment-performance/crefvariableannuity/profile?ticker=268576313>
[54] <https://www.tiaa.org/public/investment-performance/crefvariableannuity/profile?ticker=268572721>
[55] <https://www.tiaa.org/public/investment-performance/nonpropmutualfunds/profile?ticker=305427>
[56] <https://www.tiaa.org/public/investment-performance/crefvariableannuity/moneymarket/profile?ticker=268569116>
[57] <https://www.tiaa.org/public/investment-performance/crefvariableannuity/profile?ticker=268585136>
[58] <https://www.tiaa.org/public/investment-performance/crefvariableannuity/profile?ticker=268555492>
[59] <https://www.tiaa.org/public/investment-performance/mutualfunds/profile?ticker=297809>
[60] <https://www.tiaa.org/public/investment-performance/tiaavariableannuity/profile?ticker=41091375>
[61] <https://www.tiaa.org/public/offer/products/annuities/retirement-plan-annuities/tiaa-traditional-annuity>
[62] <http://surs.com/tags/investments>
[63] <http://surs.com/tags/smp>