

# ORP Change Form

Complete this form if you wish to change to another fund sponsor serving the Optional Retirement Plan.

## 1. Employee Information

Name (Last, First, Initial)	Social Security Number (required)	Date of Birth
University/Institution	Day Phone / Email	Hire Date
Home Address		

## 2. Your ORP Fund Sponsor Choice

You may direct ORP contributions to only one fund sponsor at a time. You may change your election for future contributions only once during a calendar year. Once you choose a new fund sponsor, you must complete and return the application form for your newly selected ORP fund sponsor. Note: If you are a Tier 4 ORP member, you must use the same Fund Sponsor for both of your ORP and TDI accounts.

Current ORP Fund Sponsor (name): \_\_\_\_\_

Change my ORP Fund Sponsor to (Check one and provide the date you sent the application to the new company.):

☐ **ORP: Fidelity Investments**

You must apply online or send your ORP application directly to the plan administrator, Fidelity Investments, to ensure your contributions are invested as you wish.\* Request a Getting Started Guide or apply online at [www.netbenefits.com/opurp/](http://www.netbenefits.com/opurp/)

☐ **ORP: TIAA**

You must send your TIAA application form or online application directly to TIAA to ensure your contributions are invested as you wish\*. Apply online at <https://www.tiaa.org/public/tcm/opurp/home>

**Attach confirmation of your online enrollment or a copy of your application.**

Date of Fund Sponsor Account Application: \_\_\_\_\_

## 3. Certification

I understand that this election will be effective until I change my selected ORP fund sponsor in another calendar year.

\*I further understand and agree that contributions sent to the fund sponsor selected above may be invested in an age-appropriate lifecycle fund (Fidelity Investments and TIAA) until the company receives my online or signed application form indicating my investment choice(s).

Signature

Date

**You must provide this form to your campus benefits office by the 10<sup>th</sup> of the month in which you wish this change to be effective.**