

# 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>

**ORP: VALIC**

New enrollments closed after October 10, 2007. If you were enrolled with VALIC on October, 2007 and wish to return, contact your campus benefits office to confirm you are eligible. You must return your VALIC application form to VALIC Financial Advisors, Inc. to ensure your contributions are invested as you wish\*.

**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.**