

# ORP or PERS Election Instructions

## A) Fill in your personal information:

<b>Identification:</b>	SSN:	<table border="1" style="width: 100%; height: 20px;"> <tr> <td style="width: 20px;"> </td><td style="width: 20px;"> </td><td style="width: 20px;"> </td><td style="width: 20px;"> </td><td style="width: 20px;"> </td><td style="width: 20px;"> </td><td style="width: 20px;"> </td><td style="width: 20px;"> </td><td style="width: 20px;"> </td><td style="width: 20px;"> </td> </tr> </table>											<b>Date of:</b>	Birth:	<input style="width: 90%; height: 20px;" type="text"/>
	First Name:	<input style="width: 90%; height: 20px;" type="text"/>	Hire:	<input style="width: 90%; height: 20px;" type="text"/>											
Last Name:	<input style="width: 90%; height: 20px;" type="text"/>	Eligibility:	<input style="width: 90%; height: 20px;" type="text"/>												
<b>Contact:</b>	Address:				<input style="width: 100%; height: 20px;" type="text"/>										
	City:	<input style="width: 150px; height: 20px;" type="text"/>	State	<input style="width: 40px; height: 20px;" type="text"/>	Zip Code	<input style="width: 40px; height: 20px;" type="text"/>	<input style="width: 40px; height: 20px;" type="text"/>	<input style="width: 40px; height: 20px;" type="text"/>							
	Phone/Email	<input style="width: 100%; height: 20px;" type="text"/>													
	Institution:	<input style="width: 100%; height: 20px;" type="text"/>													

## B) Elect ONE Plan: This is a one-time, irrevocable election

### Optional Retirement Plan (ORP)

- I currently have a PERS Tier 1 or 2/OPSRP account which **I do not** want to transfer.
- I currently have a PERS Tier 1 or 2/OPSRP which **I do** want to transfer to the ORP. (If so, you must also complete and submit a PERS-to-ORP Transfer Form.)

**Next Steps:** Go to Section C to select your ORP Fund Sponsor, and then complete Section D to certify your election.

### Public Employees Retirement System (PERS)/Oregon Public Service Retirement Plan (OPSRP)

**Next Steps:** Complete Section D to certify your election.

## C) ORP Fund Sponsor: If you have selected ORP, choose ONE sponsor

### ORP: Fidelity Investments

You must also enroll online at [www.netbenefits.com/opurp](http://www.netbenefits.com/opurp) to select how your contributions are invested. You may also request a Getting Started Guide and paper application by calling Fidelity Investments at 800-343-0860.

### ORP: TIAA

You must also enroll online at [www.tiaa.org/opurp](http://www.tiaa.org/opurp) to select how your contributions are invested. You may also request a Getting Started Guide and paper application by calling TIAA at 800-842-2252.

## D) Certification and Signature

I understand that the choice I make between the ORP and PERS Tiers 1 or 2/OPSRP is a one-time, irrevocable choice that will be effective as long as I am employed by the universities participating in the ORP, including future periods of employment or re-employment.

I further understand that:

1. Contributions sent to an ORP fund sponsor selected in section C may be invested in an age-appropriate lifecycle fund until the fund sponsor receives my online or signed application form indicating my investment choice(s);
2. The Board and Plan Sponsor assume no responsibility for determining that investments I select are suitable for me. I agree to indemnify and hold the Board and Plan Sponsor, its officers, employees and agents harmless from, and to pay the State of Oregon promptly on demand for, any and all losses, liabilities, claims, and costs, including reasonable attorneys' fees that may arise from my acts or omissions related to my selection of investments or services.
3. **This form must be returned to my campus benefits office by the 10<sup>th</sup> of the month in which I am eligible to enroll in the retirement plans. Late return of this form will result in automatic PERS Tiers 1 or 2/OPSRP enrollment.**

This release and indemnification is in addition to and in no way restricts any rights which may exist in law or under any other agreement(s) between me and Oregon Public Universities Retirement Plans.

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

**\*\*\*Please keep a copy of this form for your records\*\*\***

**Human Resources Use Only:** Date Received: \_\_\_\_\_

Processed by: \_\_\_\_\_

Processing Date: \_\_\_\_\_

# ORP or PERS Election Instructions

A) Fill in your personal information to assist us in processing your form. This information also allows us to contact you if we require any additional information. **All information in this section is required for us to complete your election.**

B) If you were in PERS at a previous employer, and want to remain in PERS, you will be placed into the tier based upon your individual situation. If you select the ORP, you must also complete section C. Be sure to enroll with your ORP sponsor as soon as possible to avoid any delay in investing your ORP contributions.

C) Your ORP contributions will be sent to the ORP Fund Sponsor that you select in this section. For more details about each fund sponsor, visit their OPURP-specific website or contact your local HR representative.

**ORP or PERS Election Instructions**

Clear Form

**A) Fill in your personal information:**

**Identification:** SSN:

First Name:

Last Name:

**Contact:** Address:

City:  State:  Zip Code:

Phone/Email:

Institution:

Date of:

Birth:

Hire:

Eligibility:

**B) Elect ONE Plan: This is a one-time, irrevocable election**

**Optional Retirement Plan (ORP)**  
 I currently have a PERS Tier 1 or 2/OPSRP account which I do not want to transfer.  
 I currently have a PERS Tier 1 or 2/OPSRP which I do want to transfer to the ORP. (If so, you must also complete and submit a [PERS-to-ORP Transfer Form](#).)  
Next Steps: Go to Section C to select your ORP Fund Sponsor, and then complete Section D to certify your election.

**Public Employees Retirement System (PERS)/Oregon Public Service Retirement Plan (OPSRP)**  
Next Steps: Complete Section D to certify your election.

**C) ORP Fund Sponsor: If you have selected ORP, choose ONE sponsor**

**ORP: Fidelity Investments**  
You must also enroll online at [www.netbenefits.com/opurp](http://www.netbenefits.com/opurp) to select how your contributions are invested. You may also request a Getting Started Guide and paper application by calling Fidelity Investments at 800-343-0860.

**ORP: TIAA**  
You must also enroll online at [www.tiaa.org/opurp](http://www.tiaa.org/opurp) to select how your contributions are invested. You may also request a Getting Started Guide and paper application by calling TIAA at 800-842-2252.

**D) Certification and Signature**

I understand that the choice I make between the ORP and PERS Tiers 1 or 2/OPSRP is a one-time, irrevocable choice that will be effective as long as I am employed by the universities participating in the ORP, including future periods of employment or re-employment.

I further understand that:

- Contributions sent to an ORP fund sponsor selected in section C may be invested in an age-appropriate lifecycle fund until the fund sponsor receives my online or signed application form indicating my investment choice(s);
- The Board and Plan Sponsor assume no responsibility for determining that investments I select are suitable for me. I agree to indemnify and hold the Board and Plan Sponsor, its officers, employees and agents harmless from, and to pay the State of Oregon promptly on demand for, any and all losses, liabilities, claims, and costs, including reasonable attorneys' fees that may arise from my acts or omissions related to my selection of investments or services.
- This form must be returned to my campus benefits office by the 10<sup>th</sup> of the month in which I am eligible to enroll in the retirement plans. Late return of this form will result in automatic PERS Tiers 1 or 2/OPSRP enrollment.**

This release and indemnification is in addition to and in no way restricts any rights which may exist in law or under any other agreement(s) between me and Oregon Public Universities Retirement Plans.

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

\*\*\*Please keep a copy of this form for your records\*\*\*

**Human Resources Use Only:** Date Received: \_\_\_\_\_ Processed by: \_\_\_\_\_ Processing Date: \_\_\_\_\_

D) These are some of the important ramifications of your **plan** selection. For more details about this choice please visit [www.opurp.org](http://www.opurp.org) or contact your local HR representative. Your signature and current date is required at the bottom of section D.

D3) To record your election, return this form to your campus benefits office as outlined below. If your form is not returned, you will be automatically enrolled in PERS/OPSRP.

Institution	Drop-Off Location	Mailing Address	City, State, Zip	FAX
EOU	Inlow Hall, Room 209	One University Blvd	La Grande, OR 97850	541-962-3023
OIT	Snell Hall 111	3201 Campus Dr	Klamath Falls, OR 97601	541-851-5200
OSU	236 Kerr Admin Bldg	236 Kerr Admin Bldg, MS: HR	Corvallis, OR 97331	541-737-7771
PSU	1600 SW 4 <sup>th</sup> Ave, Ste 518	P.O Box 751	Portland, OR 97207-0751	503-725-5896
SOU	Churchill 159	1250 Siskiyou Blvd	Ashland, OR 97520	541-552-8508
UO	677 E 12 <sup>th</sup> Ave. Ste 400	5210 University of Oregon	Eugene, OR 97403	541-346-2548
WOU	Admin. 306	345 N Monmouth Ave	Monmouth, OR 97361	503-838-8522