

# 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"/>								
	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: \_\_\_\_\_

