

PERS to ORP Transfer Form

A) Fill in your personal information

Identification	SSN	<table border="1" style="width: 100%; height: 20px;"> <tr> <td style="width: 12.5px;"> </td><td style="width: 12.5px;"> </td><td style="width: 12.5px;"> </td><td style="width: 12.5px;"> </td><td style="width: 12.5px;"> </td><td style="width: 12.5px;"> </td><td style="width: 12.5px;"> </td><td style="width: 12.5px;"> </td><td style="width: 12.5px;"> </td><td style="width: 12.5px;"> </td> </tr> </table>											Contact	Address					Date of	Birth	
	First Name				City		State		Zip Code		Hire										
Last Name				Phone			Institution		Eligibility												

Which tier of PERS are you in? <small>(check a box)</small>	<input type="checkbox"/> Tier 1 or Tier 2 PERS member	<input type="checkbox"/> OPSRP member
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B) Identify your PERS or OPSRP vesting status:

C) Implications of transferring your account:

D) Confirm your request:

<input type="checkbox"/> I am not vested in my PERS or OPSRP pension.	By electing to participate in the ORP, you are required by state law to transfer your PERS or OPSRP IAP funds to the ORP, and you will lose your PERS or OPSRP pension benefits. CAUTION: By law, unvested members of PERS or OPSRP cannot keep their pension benefits if they join the ORP. They must remain in PERS or OPSRP to keep their pension. If you remain in PERS or OPSRP, you will not be able to participate in ORP at any future date.	<input type="checkbox"/> I understand that my PERS or OPSRP IAP funds must be transferred to the ORP, and I will lose my PERS or OPSRP pension benefits.
<input type="checkbox"/> I am vested in my PERS or OPSRP pension.	By electing to participate in the ORP, you have two options: 1) You may transfer your PERS or OPSRP IAP funds to the ORP, and you will lose your vested PERS or OPSRP pension benefits. 2) You may participate in the ORP but keep your IAP funds in your PERS or OPSRP account. You will remain an inactive member of PERS or OPSRP and keep your pension benefits, and you will begin receiving retirement contributions to the ORP.	<input type="checkbox"/> Option 1: I request that my PERS or OPSRP IAP funds be transferred to the ORP. I understand that I will lose my PERS or OPSRP pension benefits. <input type="checkbox"/> Option 2: I request that my PERS or OPSRP IAP funds remain in my PERS or OPSRP account, and I will keep my PERS or OPSRP pension benefits.

E) Instructions

Use the checklist to the right to confirm that you have completed all necessary steps to make sure that your transfer proceeds smoothly.
 *Transfers will not be completed without all four steps completed.
 *Return this transfer form and the election form to your campus benefits office.
 *Please keep a copy of this form for your records.

To-do: PERS to ORP Transfer Form (this form)
 ORP or PERS Election Form
 Enroll with your Fund Sponsor (TIAA or Fidelity)
 Complete your Fund Sponsor's Transfer Form and return it to your Fund Sponsor

F) Certification and Signature

I authorize PERS to make the transfers requested in Section D and request the transfers be distributed to the ORP Fund Sponsor named on my Retirement Plan Election Form. I understand that my decision to transfer or not transfer IAP funds from PERS to ORP is irrevocable and that my funds cannot be returned to PERS.

Signed By _____ Date _____

Human Resources Only: Date Received: _____ Processed by: _____ Date sent to PERS: _____

PERS to ORP Transfer Form

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 transfer.**

C) These are some of the important ramifications of transferring your account. For more details about the ORP please visit www.opurp.org or contact your local HR representative. No action is necessary in section C, but please read it carefully.

B) If you have questions about your PERS or OPSRP retirement benefits, contact PERS at:

Mailing Address
PO Box 23700
Tigard, OR 97281-3700

Telephone
(Monday-Friday, 8:30AM-5PM)
503-598-7377
888-320-7377 (toll free)
503-603-7766 (TTY)
503-598-0561

Email
customer-service.pers@state.or.us

E) Your enrollment and transfer form can be obtained from your Fund Sponsor. Make sure that you provide contact information in section A so that we can get in touch if we require any additional information.

D) Confirm your decision whether to transfer your PERS or OPSRP IAP account.

F) Please sign and date this form once all other sections have been completed. After this form is complete, return it, along with all other relevant forms, to your campus benefits office (listed below). **Remember to keep a copy of this form for your records.**

PERS to ORP Transfer Form

A) Fill in your personal information

Identification: SSN [], First Name [], Last Name []

Contact: City [], State [], Zip Code [], Phone [], Institution []

Date of Birth [], Hire [], Eligibility []

Which tier of PERS are you in? (Check a box) Tier 1 or Tier 2 PERS member OPSRP member

B) Identify your PERS or OPSRP vesting status:

I am not vested in my PERS or OPSRP pension.

I am vested in my PERS or OPSRP pension.

C) Implications of transferring your account:

By electing to participate in the ORP, you are required by state law to transfer your PERS or OPSRP IAP funds to the ORP, and you will lose your PERS or OPSRP pension benefits.

CAUTION: By law, unvested members of PERS or OPSRP cannot keep their pension benefits if they join the ORP. They must remain in PERS or OPSRP to keep their pension. If you remain in PERS or OPSRP, you will not be able to participate in ORP at any future date.

By electing to participate in the ORP, you have two options:

- 1) You may transfer your PERS or OPSRP IAP funds to the ORP, and you will lose your vested PERS or OPSRP pension benefits.
- 2) You may participate in the ORP but keep your IAP funds in your PERS or OPSRP account. You will remain an inactive member of PERS or OPSRP and keep your pension benefits, and you will begin receiving retirement contributions to the ORP.

D) Confirm your request:

I understand that my PERS or OPSRP IAP funds must be transferred to the ORP, and I will lose my PERS or OPSRP pension benefits.

Option 1: I request that my PERS or OPSRP IAP funds be transferred to the ORP. I understand that I will lose my PERS or OPSRP pension benefits.

Option 2: I request that my PERS or OPSRP IAP funds remain in my PERS or OPSRP account, and I will keep my PERS or OPSRP pension benefits.

E) Instructions

Use the checklist to the right to confirm that you have completed all necessary steps to make sure that your transfer proceeds smoothly.

- *Transfer will not be completed without all four steps completed.
- *Return this transfer form and the election form to your campus benefits office.
- *Please keep a copy of this form for your records.

To-do: PERS to ORP Transfer Form (this form)
ORP or PERS Election Form
Enroll with your Fund Sponsor (TIAA or Fidelity)
Complete your Fund Sponsor's Transfer Form and return it to your Fund Sponsor

F) Certification and Signature

I authorize PERS to make the transfers requested in Section D and request the transfers be distributed to the ORP Fund Sponsor named on my Retirement Plan Election Form. I understand that my decision to transfer or not transfer IAP funds from PERS to ORP is irrevocable and that my funds cannot be returned to PERS.

Signed By _____ Date _____

Human Resources Only: Date Received: _____ Processed by: _____ Date sent to PERS: _____

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 97331-2132	541-737-7771
PSU	1600 SW 4 th Ave, Suite 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 th Ave, Suite 400	5210 University of Oregon	Eugene, OR 97403	541-346-2548
WOU	Admin Bldg 306	345 N Monmouth Ave	Monmouth, OR 97361	503-838-8144