### State University System Optional Retirement (SUSORP)

#### Plan Overview, Eligibility & Vesting:
- **SUSORP** is a qualified defined contribution plan sponsored by FIU.
- The amount of your benefit at retirement is determined by the contributions made to your account and the performance of your investment choices.
- Faculty and Administrative and Professional (AP&P) employees.
- Mandatory for College of Medicine Faculty Members.
- Your employer contributions are immediately 100% vested upon signing enrollment form.

#### Contributions:
- You contribute 3% of your gross biweekly salary.
- FIU contributes a fixed percentage of your gross biweekly salary based on Florida legislation.
- Contributions are allocated into the account of your choice, established in your name.
- You may also contribute a voluntary amount that cannot exceed the percent contributed by the university.

#### Enrollment Deadlines:
- Enrollment in this plan must occur within **90 calendar days** from your date of hire or eligibility period.
- You will default to the FRS Investment Plan if you do not make an election by your deadline.

#### How to Enroll/Make Changes:
To enroll in the SUSORP, you must complete the two steps below within **90 calendar days of eligibility**:
1. Execute a contract with a SUSORP provider.
2. Fill out the ORP enrollment form OR the SUSORP Change Form, if making a change.

*Faculty employees of College of Medicine are mandatory members of the Optional Retirement Program and must use the ORP mandatory form*

#### How to submit SUSORP forms:
There are **three** ways to submit the Enrollment or Change form:
2. Fax to 305-348-3884
3. Email to Benefits@fiu.edu without Social Security Number (include Panther ID in Subject line)

### SUSORP Plan Providers

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Representative</th>
<th>Contact Information</th>
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<tbody>
<tr>
<td>Florida Retirement System</td>
<td>Customer Service</td>
<td>1-866-446-9377 <a href="http://www.myfrs.com">Myfrs.com</a></td>
</tr>
<tr>
<td><strong>Corebridge Financial</strong> (Formerly AIG / VALIC)</td>
<td>Jim Hopler Customer Service</td>
<td>(305) 213-8895 <a href="mailto:Jim.Hopler@corebridgefinancial.com">Jim.Hopler@corebridgefinancial.com</a> (800) 426-3753</td>
</tr>
<tr>
<td><strong>Equitable</strong> (Formerly AXA)</td>
<td>Michael Goldberg Customer Service</td>
<td>(561) 997-7800 <a href="mailto:Michael.Goldberg2@Equitable.com">Michael.Goldberg2@Equitable.com</a> (866) 401-3030</td>
</tr>
<tr>
<td><strong>TIAA</strong></td>
<td>Julio Castillo Customer Service</td>
<td>(561) 393-1301 <a href="mailto:Julio.Castillo@tiaa.org">Julio.Castillo@tiaa.org</a> (800) 842-2252</td>
</tr>
<tr>
<td><strong>Voya Financial</strong></td>
<td>Greg Sokolow Customer Service</td>
<td>(407) 890-0488 <a href="mailto:Greg@Gaborfs.com">Greg@Gaborfs.com</a> (800) 330-6115; Fax (850) 894-4268</td>
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*Revised 1/9/2024*