Plan Overview:  
- 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.

Eligibility:  
- Faculty and Administrative and Professional (AP&P) employees.  
- Mandatory for College of Medicine Faculty Members.

Vesting  
- Your employer contributions are immediately 100% vested upon signing enrollment form.

Contributions:  
- Mandatory contributions 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.  
- You will default to the Pension plan if you do not make an election by your deadline.

How to Enroll:  
- To enroll in the SUSORP, you must complete two steps by deadline:  
  1) Fill out and submit the ORP enrollment form to HR Benefits Administration / PC224  
  2) Execute a contract with a SUSORP provider

Changes  
- If changing company: execute a new contract with SUSORP provider and complete SUSORP Change Form (ORP) and submit ORP change form to HR Benefits Administration / PC 224  
- If changing amount of your contributions: complete SUSORP Change Form (ORP) and submit to HR Benefits Administration / PC 224

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PROGRAM (SUSORP) PLAN PROVIDERS

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Agent</th>
<th>Phone Number</th>
</tr>
</thead>
</table>
| AXA                   | Michael Goldberg           | (954) 298-9977  
  Alejandro Gonzalez    | (305) 332-4420  
  Jose David Gonzalez   | jose.gonzalez3@axa-advisors.com |
| MetLife               | Richard Akirmaian          | (954) 434-0351  
  [on-line enrollment not available] | rakirmaian@metlife.com |
| TIAA-CREF             | Sharon Mohan               | (561) 393-1310  
  Hope Glashen          | hope.glashen@tiaa-cref.org |
  Alberto Segovia       | (305) 921-6826  
  Alberto Segovia       | Alberto.Segovia@tiaa.org |
| VALIC                 | Jim Hopler                 | (305) 213-8895  
  Mark Braginsky        | jim.hopler@valic.com      |
  [www.valic.com/FLORIDAORP] | (305) 240-2451  
  Mark Braginsky        | mark.braginsky@valic.com  |
| VOYA                  | Kevin Cox                  | (954) 200-9399  
  Greg Sokolow          | kcox@gaboragency.com      |
  [www.ingretirementplans.com/custom/florp/] | (305) 761-3532  
  Local Office          | greg@gaboragency.com      |
| FRS                   | Florida Retirement System  | 1-866-446-9377 or MyFRS.com                      |

FRS Financial guidance line  
Florida Retirement System
**Tax-Sheltered Plan Providers (403b)**

<table>
<thead>
<tr>
<th>Eligibility:</th>
<th>Faculty, Administrative and Staff (Full Time &amp; Part Time)</th>
</tr>
</thead>
</table>

| Contributions: | Contributions are placed into an account, established in your name  
<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td></td>
<td>You decide how to allocate all contributions among the investment funds &amp; providers</td>
</tr>
</tbody>
</table>

| How to Enroll and Changes: | 1️⃣ Execute a contract with a provider from the list below  
<table>
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<tr>
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<tbody>
<tr>
<td></td>
<td>2️⃣ Go to my.fiu.edu and fill out the Voluntary Retirement Contribution Form (Human Resources Self Service - Employee Self Service - Employee Resources - Employee Forms - Benefits Forms - Retirement Voluntary Contribution)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Contact Information</th>
</tr>
</thead>
</table>
| AXA | Michael Goldberg: (954) 298-9977  
Alejandro Gonzalez: (305) 332-4420  
Jose David Gonzalez: (786) 303-6416  
Customer Service: (866) 401-3030  
Customer Service: (866) 401-3030 |
| FIDELITY INVESTMENTS | Customer Service: (800) 343-0860 |
| METLIFE | Richard Akirmaian: (954) 434-0351  
Customer Service: (800) 543-2520 |
| T-ROWE PRICE | Customer Service: (800) 492-7670 |
| TIAA-CREF | Sharon Mohan: (561) 393-1310  
Hope Glashen: (561) 393-1330  
Alberto Segovia: (305) 921-6826  
Customer Service: (800) 842-2252 |
| VANGUARD GROUP | Customer Service: (800) 662-2003 |
| VOYA/ JEFFERSON/SYMETRA | Kevin Cox: (954) 200-9399  
Greg Sokolow: (305) 761-3532  
Office (305) 348-8222 |
| VALIC | Jim Hopler: (305) 213-8895  
Mark Braginsky: (305) 240-2451  
Customer Service: (800) 892-5558 |

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**Deferred Compensation Plan (457)**

<table>
<thead>
<tr>
<th>Eligibility:</th>
<th>Faculty, Administrative and Staff (Full Time + Part Time)</th>
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</table>

| Contributions: | Contributions are placed into an account, established in your name  
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<tr>
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<tbody>
<tr>
<td></td>
<td>You decide how to allocate all contributions among the investment funds &amp; providers</td>
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<table>
<thead>
<tr>
<th>How to Enroll and Changes:</th>
<th>Enrollment and changes processed directly with vendor of choice.</th>
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<table>
<thead>
<tr>
<th>Company Name</th>
<th>Agent</th>
<th>Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>CHARLES SCHWAB (Enrollment Through Nationwide)</td>
<td>Customer Service</td>
<td>(888) 393-7272</td>
</tr>
<tr>
<td>EMPOWER RETIREMENT (Formerly GREAT WEST)</td>
<td>Customer Service</td>
<td>(800) 444-9412</td>
</tr>
<tr>
<td>NATIONWIDE</td>
<td>Customer Service</td>
<td>(800) 949-4457</td>
</tr>
<tr>
<td>T. ROWE PRICE</td>
<td>Customer Service</td>
<td>(800) 893-0269</td>
</tr>
<tr>
<td>VALIC</td>
<td>Customer Service</td>
<td>(888) 467-3726</td>
</tr>
<tr>
<td>VOYA</td>
<td>Customer Service</td>
<td>(800) 282-6295</td>
</tr>
</tbody>
</table>