State University System Optional Retirement (SUSORP)

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:
- 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 days from the date of hire.
- You will default to the FRS Investment Plan if you do not make an election by your deadline.

How to Enroll:
- To enroll in the SUSORP, you must complete the two steps below:
  1) Execute a contract with a **SUSORP provider**
  2) Fill out and submit the ORP enrollment form to HR Benefits Administration/PC-224
*Faculty employees of College of Medicine are *mandatory* members of the Optional Retirement Program and must use the ORP mandatory form

Changes:
- If **Changing Company**: Execute a contract with new **SUSORP** provider, then complete and submit **SUSORP Change Form** and submit form to HR Benefits Administration/PC-224
- If **Changing Contributions**: Complete and submit **SUSORP Change Form** and submit form to HR Benefits Administration/PC-224

### PROGRAM (SUSORP) PLAN PROVIDERS

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Agent</th>
<th>Phone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Florida Retirement System</td>
<td>Customer Service</td>
<td>1-866-446-9377 or MyFRS.com</td>
</tr>
<tr>
<td>AXA</td>
<td>Andrew Jimenez, Pietra Smuczek, Marcos Gutierrez</td>
<td>(305) 670-7616 <a href="mailto:Andrew.jimenez@axa-advisors.com">Andrew.jimenez@axa-advisors.com</a>, (973) 255-6375 <a href="mailto:Pietra.smuczek@axa-advisors.com">Pietra.smuczek@axa-advisors.com</a>, (786) 973-6156 <a href="mailto:Marcos.gutierrez@axa-advisors.com">Marcos.gutierrez@axa-advisors.com</a></td>
</tr>
<tr>
<td>MetLife</td>
<td>Richard Akirmaian, Customer Service</td>
<td>(954) 434-0351 <a href="mailto:rakirmaian@financialguide.com">rakirmaian@financialguide.com</a>, (800) 560-5001</td>
</tr>
<tr>
<td>TIAA</td>
<td>Sharon Mohan, Alberto Segovia</td>
<td>(561) 393-1310 <a href="mailto:smohan@tiaa.org">smohan@tiaa.org</a>, (305) 921-6826 <a href="mailto:Alberto.Segovia@tiaa.org">Alberto.Segovia@tiaa.org</a></td>
</tr>
<tr>
<td>AIG (VALIC)</td>
<td>Jim Hopler, Mark Braginsky, Customer Service</td>
<td>(305) 213-8895 <a href="mailto:Jim.Hopler@aig.com">Jim.Hopler@aig.com</a>, (305) 710-4761 <a href="mailto:Mark.Braginsky@aig.com">Mark.Braginsky@aig.com</a>, (800) 448-2542</td>
</tr>
<tr>
<td>VOYA</td>
<td>Greg Sokolow, Local Office</td>
<td>(305) 761-3532 <a href="mailto:greg@gaboragency.com">greg@gaboragency.com</a>, (305) 348-8222, Fax (305)348-8275</td>
</tr>
</tbody>
</table>
### Tax Shelter Plan Providers (403)b

| Eligibility: | Faculty and Administrative and Staff (Full Time & Part Time) |
| Contributions: | Contributions are allocated into the account of your choice, established in your name.  
You decide how to allocate all contributions among the investment funds & providers |
| How to Enroll and changes: | Execute a contract with a provider from the list below  
Go to [my.fiu.edu](https://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) |

#### Company Name | Agent | Phone Number |
|-----------------|--------|-------------|
| **AIG (VALIC)** | Jim Hopler  
Mark Braginsky  
Customer Service | (305) 213-8895 [Jim.Hopler@aig.com](mailto:Jim.Hopler@aig.com)  
(305) 710-4761 [Mark.Braginsky@aig.com](mailto:Mark.Braginsky@aig.com)  
(800) 448-2542 |
| **AXA** | Andrew Jimenez  
Pietra Smuczek  
Marcos Gutierrez | (305) 670-7616 [Andrew.jimenez@axa-advisors.com](mailto:Andrew.jimenez@axa-advisors.com)  
(973) 255-6375 [Pietra.smuczek@axa-advisors.com](mailto:Pietra.smuczek@axa-advisors.com)  
(786) 973-6156 [Marcos.gutierrez@axa-advisors.com](mailto:Marcos.gutierrez@axa-advisors.com) |
| **FIDELITY INVESTMENTS** | Customer Service | (800) 343-0860 |
| **MetLife** | Richard Akirmaian  
Customer Service | (954) 434-0351 [rakirmaian@financialguide.com](mailto:rakirmaian@financialguide.com)  
(800) 560-5001 |
| **TIAA** | Sharon Mohan  
Alberto Segovia | (561) 393-1310 [smohan@tiaa.org](mailto:smohan@tiaa.org)  
(305) 921-6826 [Alberto.Segovia@tiaa.org](mailto:Alberto.Segovia@tiaa.org) |
| **T. ROWE PRICE** | Customer Service | (800) 492-7670 |
| **VANGUARD GROUP** | Customer Service | (800) 569-4903 |
| **VOYA** | Greg Sokolow  
Local Office | (305) 761-3532 [greg@gaboragency.com](mailto:greg@gaboragency.com)  
(305) 348-8222; Fax (305)348-8275 |

* Roth 403(b) option also available

---

### Deferred Compensation Plan (457)

| Eligibility: | Faculty and Administrative and Staff (Full Time & Part Time) |
| Contributions: | Contributions are allocated into the account of your choice, established in your name.  
You decide how to allocate all contributions among the investment funds & providers |
| How to Enroll and Changes: | **Enrollments** and **Changes** are processed **directly** with the vendor |

#### Company Name | Agent | Phone Number |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>BUREAU OF DEFERRED COMPENSATION</strong></td>
<td>Customer Service</td>
<td>(877) 299-8002</td>
</tr>
</tbody>
</table>
| **Charles Schwab**  
(Enrollment with Nationwide) | Customer Service | (888) 393-7272 |
| **Nationwide** | Customer Service | (800) 949-4457 |
| **AIG (VALIC)** | Customer Service | (800) 467-3726 |
| **VOYA** | Customer Service | (800) 282-6295 |