

State University System Optional Retirement (SUSORP)

Plan Overview:	<ul style="list-style-type: none"> ▪ 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:	<ul style="list-style-type: none"> ▪ Faculty and Administrative and Professional (AP&P) employees. ▪ Mandatory for College of Medicine Faculty Members.
Vesting	<ul style="list-style-type: none"> ▪ Your employer contributions are immediately 100% vested upon signing enrollment form.
Contributions:	<ul style="list-style-type: none"> ▪ 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:	<ul style="list-style-type: none"> ▪ 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:	<ul style="list-style-type: none"> ▪ To enroll in the SUSORP, you must complete the two steps below: <ol style="list-style-type: none"> 1) Execute a contract with a SUSORP provider 2) Fill out and submit the ORP enrollment form to HR Benefits Administration/ PC-224 <p><i>*Faculty employees of College of Medicine are mandatory members of the Optional Retirement Program and must use the ORP mandatory form</i></p>
Changes	<ul style="list-style-type: none"> ▪ 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

Company Name	Agent	Phone Number
Florida Retirement System	Customer Service	1-866-446-9377 or MyFRS.com
AXA Customer Service: (866) 401- 3030	Pietra Smuczek Michael Goldberg	(973) 255-6375 Pietra.smuczek@axa-advisors.com (561) 997-7800 Michael.Goldberg2@equitable.com
MetLife	Richard Akirmaian Customer Service	(954) 434-0351 rakirmaian@financialguide.com (800) 560-5001
TIAA	Sharon Mohan Alberto Segovia	(561) 393-1310 smohan@tiaa.org (305) 921-6826 Alberto.Segovia@tiaa.org
AIG (VALIC)	Jim Hopley Mark Braginsky Customer Service	(305) 213-8895 Jim.Hopley@aig.com (305) 710-4761 Mark.Braginsky@aig.com (800) 448-2542
VOYA Customer Service: (800) 525-4225	Greg Sokolow Local Office	(305) 761-3532 greg@gaboragency.com (305) 348-8222; Fax (305)348-8275

Tax Shelter Plan Providers (403)b

Eligibility:	<ul style="list-style-type: none"> Faculty and Administrative and Staff (Full Time & Part Time)
Contributions:	<ul style="list-style-type: none"> 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:	<ul style="list-style-type: none"> Execute a contract with a provider from the list below Go to my.fiu.edu and fill out the Voluntary Retirement Contribution Form (<i>Human Resources Self Service - Employee Self Service - Employee Resources - Employee Forms - Benefits Forms - Retirement Voluntary Contribution</i>)

Company Name	Agent	Phone Number
AXA Customer Service: (866) 401- 3030	Pietra Smuczek Marcos Gutierrez	(973) 255-6375 Pietra.smuczek@axa-advisors.com (786) 973-6156 Marcos.gutierrez@axa-advisors.com
FIDELITY INVESTMENTS	Customer Service	(800) 343-0860
MetLife	Richard Akirmaian Customer Service	(954) 434-0351 rakirmaian@financialguide.com (800) 560-5001
TIAA-CREF	Sharon Mohan Alberto Segovia	(561) 393-1310 smohan@tiaa.org (305) 921-6826 Alberto.Segovia@tiaa.org
T. ROWE PRICE	Customer Service	(800) 492-7670
AIG (VALIC)	Jim Hopler Mark Braginsky Customer Service	(305) 213-8895 Jim.Hopler@aig.com (305) 710-4761 Mark.Braginsky@aig.com (800) 448-2542
VANGUARD GROUP	Customer Service	(800) 569-4903
VOYA / JEFFERSON / SYMETRA	Greg Sokolow Local Office	(305) 761-3532 greg@gaboragency.com (305) 348-8222; Fax (305)348-8275

Deferred Compensation Plan (457)

Eligibility:	<ul style="list-style-type: none"> Faculty and Administrative and Staff (Full Time & Part Time)
Contributions:	<ul style="list-style-type: none"> 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:	<ul style="list-style-type: none"> Enrollments and Changes are processed directly with the vendor

Company Name	Agent	Phone Number
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
Bureau of Deferred Compensation:	Customer Service	(877) 299-8002