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

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**PROGRAM (SUSORP) PLAN PROVIDERS**

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Agent</th>
<th>Phone Number</th>
<th>Email Addresses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Florida Retirement System</td>
<td>Customer Service</td>
<td>1-866-446-9377 or MyFRS.com</td>
<td></td>
</tr>
<tr>
<td>AXA</td>
<td></td>
<td>(561) 997-7800 <a href="mailto:Michael.Goldberg2@equitable.com">Michael.Goldberg2@equitable.com</a></td>
<td><a href="mailto:Daniel.delrio@equitable.com">Daniel.delrio@equitable.com</a></td>
</tr>
<tr>
<td>AXA Customer Service: (866) 401-3030</td>
<td>Michael Goldberg Daniel Del Rio</td>
<td>(786) 370-6125 <a href="mailto:Daniel.delrio@equitable.com">Daniel.delrio@equitable.com</a></td>
<td></td>
</tr>
<tr>
<td>MetLife - No new enrollment, inquiry and existing account contact only</td>
<td>Richard Akirmaian Customer Service</td>
<td>(954) 434-0351 <a href="mailto:rakirmaian@financialguide.com">rakirmaian@financialguide.com</a></td>
<td></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></td>
<td><a href="mailto:Alberto.Segovia@tiaa.org">Alberto.Segovia@tiaa.org</a></td>
</tr>
<tr>
<td>TIAA Customer Service</td>
<td></td>
<td>(305) 921-6826 <a href="mailto:Alberto.Segovia@tiaa.org">Alberto.Segovia@tiaa.org</a></td>
<td></td>
</tr>
<tr>
<td>AIG (VALIC)</td>
<td>Jim Hopler Mark Braginsky</td>
<td>(305) 213-8895 <a href="mailto:Jim.Hopler@aig.com">Jim.Hopler@aig.com</a></td>
<td></td>
</tr>
<tr>
<td>AIG (VALIC) Customer Service</td>
<td></td>
<td>(305) 710-4761 <a href="mailto:Mark.Braginsky@aig.com">Mark.Braginsky@aig.com</a></td>
<td>(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></td>
<td>(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](http://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
--- | --- | ---
AXA | Michael Goldberg, Daniel Del Rio | (561) 997-7800 Michael.Goldberg2@equitable.com, (786) 370-6125 Daniel.delrio@equitable.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

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## 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
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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