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>
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<tbody>
<tr>
<td><strong>Florida Retirement System</strong></td>
<td>Customer Service</td>
<td>1-866-446-9377 or MyFRS.com</td>
</tr>
<tr>
<td><strong>AXA</strong></td>
<td>Michael Goldberg, Daniel Del Rio</td>
<td>(561) 997-7800 <a href="mailto:Michael.Goldberg2@equitable.com">Michael.Goldberg2@equitable.com</a>, (786) 370-6125 <a href="mailto:Daniel.delrio@equitable.com">Daniel.delrio@equitable.com</a></td>
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<tr>
<td><strong>MetLife - No new enrollment, inquiry and existing account contact only</strong></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>
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<td><strong>TIAA</strong></td>
<td>Sharon Mohan</td>
<td>(561) 393-1310 <a href="mailto:smohan@tiaa.org">smohan@tiaa.org</a></td>
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<td><strong>AIG (VALIC)</strong></td>
<td>Jim Hopler, Kevin Quesada</td>
<td>(305) 213-8895 <a href="mailto:Jim.Hopler@aig.com">Jim.Hopler@aig.com</a>, (786) 910-7620 <a href="mailto:Kevin.Quesada@aig.com">Kevin.Quesada@aig.com</a>, (800) 448-2542</td>
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<tr>
<td><strong>VOYA</strong></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>
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