State University System Optional Retirement (SUSORP)

### Plan Overview, Eligibility & Vesting:
- **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.
- Faculty and Administrative and Professional (AP&P) employees.
- Mandatory for College of Medicine Faculty Members.
- 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 calendar days from your date of hire.
- You will default to the FRS Investment Plan if you do not make an election by your deadline.

### How to Enroll/Make Changes:
To enroll in the SUSORP, you must complete the two steps below:
1) Execute a contract with a SUSORP provider
2) Fill out the ORP enrollment form OR the SUSORP Change Form, if making a change

*Faculty employees of College of Medicine are mandatory members of the Optional Retirement Program and must use the ORP mandatory form*

### How to submit SUSORP forms:
There are three ways to submit the Enrollment or Change form:
2) Fax to 305-348-3884
3) Email to Benefits@fiu.edu without Social Security Number (include Panther ID in Subject line)

### SUSORP Plan Providers

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Representative</th>
<th>Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Florida Retirement System</td>
<td>Customer Service</td>
<td>1-866-446-9377 Myfrs.com</td>
</tr>
<tr>
<td><strong>Equitable (AXA)</strong></td>
<td>Michael Goldberg</td>
<td>(561) 997-7800 <a href="mailto:Michael.Goldberg2@Equitable.com">Michael.Goldberg2@Equitable.com</a></td>
</tr>
<tr>
<td>Customer Service: (866) 401-3030</td>
<td></td>
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<tr>
<td>TIAA</td>
<td>Sharon Mohan</td>
<td>(561) 393-1310 <a href="mailto:Smohan@Tiaa.org">Smohan@Tiaa.org</a></td>
</tr>
</tbody>
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| AIG (VALIC)              | Jim Hopler, Kevin Quesada| (305) 213-8895 Jim.Hopler@Aig.com
|                          | Customer Service        | (786) 910-7620 Kevin.Quesada@Aig.com       |
|                          |                         | (800) 448-2542                             |
| VOYA                     | Greg Sokolow, Local Office| (407) 890-0488 Greg@Gaborfs.com          |
| Customer Service: (800) 525-4225 |                        | (800) 330-6115; Fax (850) 894-4268        |