**State University System Optional Retirement (SUSORP)**

**Plan Overview, Eligibility & Vesting:**
+ **SUSORP** is a defined contribution plan qualified under section 403(b) of the Internal Revenue 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 enrolling and executing an investment contract with an approved SUSORP provider of your choice.

**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 **ORP enrollment** or if making a change **SUSORP Change Form**

*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 Form:**
There are three ways to submit the Enrollment or Change form:
1) Upload through Panther Soft ([DHR Benefits Document Upload Portal](#)):
   my.fiu.edu> Employee Resources > Employee Forms > Benefits Forms > Self Service Upload
2) Fax to 305-348-3884
3) Email to Benefits@fiu.edu without Social Security Number (include Panther ID in Subject line)

---

**PROGRAM (SUSORP) PLAN PROVIDERS**

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Agent</th>
<th>Phone Number</th>
</tr>
</thead>
<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</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>Daniel Del Rio</td>
<td>(786) 370-6125 <a href="mailto:Daniel.Delrio@Equitable.com">Daniel.Delrio@Equitable.com</a></td>
</tr>
<tr>
<td><strong>TIAA</strong></td>
<td>Sharon Mohan</td>
<td>(561) 393-1310 <a href="mailto:Smohan@Tiaa.org">Smohan@Tiaa.org</a></td>
</tr>
<tr>
<td><strong>AIG (VALIC)</strong></td>
<td>Jim Hopler</td>
<td>(305) 213-8895 <a href="mailto:Jim.Hopler@Aig.com">Jim.Hopler@Aig.com</a></td>
</tr>
<tr>
<td>Customer Service: (800) 448-2542</td>
<td>Kevin Quesada</td>
<td>(786) 910-7620 <a href="mailto:Kevin.Quesada@Aig.com">Kevin.Quesada@Aig.com</a></td>
</tr>
<tr>
<td><strong>VOYA</strong></td>
<td>Greg Sokolow</td>
<td>(407) 890-0488 <a href="mailto:Greg@Gaborfs.com">Greg@Gaborfs.com</a></td>
</tr>
<tr>
<td>Customer Service: (800) 525-4225</td>
<td>Local Office</td>
<td>(800) 330-6115; Fax (850) 894-4268</td>
</tr>
</tbody>
</table>