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

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<thead>
<tr>
<th>Company Name</th>
<th>Representative</th>
<th>Contact Information</th>
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<tbody>
<tr>
<td>Florida Retirement System</td>
<td>Customer Service</td>
<td>1-866-446-9377 Myfrs.com</td>
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<tr>
<td>Equitable (AXA)</td>
<td>Michael Goldberg</td>
<td>(561) 997-7800 <a href="mailto:Michael.Goldberg2@Equitable.com">Michael.Goldberg2@Equitable.com</a> (866) 528-0204</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>
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<td>(800) 842-2776</td>
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<td>Corebridge (AIG/VALIC)</td>
<td>Jim Hopler</td>
<td>(305) 213-8895 <a href="mailto:Jim.Hopler@corebridgefinancial.com">Jim.Hopler@corebridgefinancial.com</a></td>
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<td>(800) 987-1143</td>
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<tr>
<td>VOYA (Enrollment through Gabor Financial Solutions)</td>
<td>Greg Sokolow</td>
<td>(407) 890-0488 <a href="mailto:Greg@Gaborfs.com">Greg@Gaborfs.com</a></td>
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<td>(800) 330-6115; Fax (850) 894-4268</td>
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