**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>
</tr>
</thead>
<tbody>
<tr>
<td>Florida Retirement System</td>
<td>Customer Service</td>
<td>1-866-446-9377 or MyFRS.com</td>
</tr>
<tr>
<td>AXA</td>
<td>Customer Service: (866) 401- 3030</td>
<td>(561) 997-7800 <a href="mailto:Michael.Goldberg2@equitable.com">Michael.Goldberg2@equitable.com</a></td>
</tr>
<tr>
<td></td>
<td>Michael Goldberg</td>
<td>(786) 370-6125 <a href="mailto:Daniel.delrio@equitable.com">Daniel.delrio@equitable.com</a></td>
</tr>
<tr>
<td></td>
<td>Daniel Del Rio</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> (800) 560-5001</td>
</tr>
<tr>
<td>TIAA</td>
<td>Sharon Mohan</td>
<td>(561) 393-1310 <a href="mailto:smohan@tiaa.org">smohan@tiaa.org</a></td>
</tr>
<tr>
<td>AIG (VALIC)</td>
<td>Jim Hopler Customer Service</td>
<td>(305) 213-8895 <a href="mailto:Jim.Hopler@aig.com">Jim.Hopler@aig.com</a></td>
</tr>
<tr>
<td></td>
<td>Kevin Quesada Customer Service</td>
<td>(800) 330-6115; Fax (850) 894-4268</td>
</tr>
<tr>
<td>VOYA</td>
<td>Greg Sokolow Customer Service</td>
<td>(407) 890-0488 <a href="mailto:gskolow@gaborfs.com">gskolow@gaborfs.com</a></td>
</tr>
<tr>
<td></td>
<td>Local Office</td>
<td>(407) 890-0488 <a href="mailto:gskolow@gaborfs.com">gskolow@gaborfs.com</a></td>
</tr>
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*Faculty employees of College of Medicine are mandatory members of the Optional Retirement Program and must use the ORP mandatory form*
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 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 | (954) 434-0351 rakirmaian@financialguide.com
TIAA-CREF | Sharon Mohan | (561) 393-1310 smohan@tiaa.org
T. ROWE PRICE | Customer Service | (800) 492-7670
AIG (VALIC) | Jim Hopler, Kevin Quesada | (305) 213-8895 Jim.Hopler@aig.com, (786) 910-7620 Kevin.Quesada@aig.com
VANGUARD GROUP | Customer Service | (800) 569-4903
VOYA / JEFFERSON / SYMETRA | Greg Sokolow, Local Office | (407) 890-0488 gsokolow@gaborfs.com, (800) 330-6115; Fax (850) 894-4268

Deferred Compensation Plan 457(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: ▪ 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