



# Roadmap to OSU's Retirement Benefits:

## *Post-Doctoral Scholar Employees*



### ***FIRST 6 MONTHS OF EMPLOYMENT***

#### **Review OSU's Retirement Benefits**

1. Voluntary Retirement Savings Plans: <https://beav.es/oPf>
2. Post-Doctoral Scholars Retirement Program: <https://beav.es/oPd>
3. Meet with one of OSU's HR Retirement Officers (optional): <https://beav.es/5hz>

#### **Meet with a Financial/Retirement Planner (optional)**

Meet with a financial/retirement planner at any time.

- **Fidelity Representative**  
Justin Blatny, Director, Retirement Planner  
[www.netbenefits.com/opurp](http://www.netbenefits.com/opurp) | Phone: 503-278-0414
- **TIAA Representative**  
AJ Martinez, CFP and Ian Rothrock | TIAA Financial Solutions  
[www.TIAA.org/schedulenow](http://www.TIAA.org/schedulenow) | Phone: 800-842-2252

#### **Enroll in Voluntary Retirement Savings Plans (optional)**

Enroll at any time during employment at OSU.

1. 403(b) Plan Enroll: <https://beav.es/403b>
- AND/OR**
2. 457 Plan Enroll: [www.growyourtomorrow.com](http://www.growyourtomorrow.com)

#### **Receive Retirement Plan Notification**

If eligible, receive Retirement Plan Notification to OSU email account in **5th month of employment**.

- Review info in notification, including attachments.

#### **Enroll in Post-Doctoral Scholars Retirement Plan (optional)**

Submit *403(b) Voluntary Retirement Savings form* to enroll in the Post-Doctoral Scholars Optional Retirement Plan (ORP) **AND** the 403(b) Plan.