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](https://beav.es/oPf)
2. Post-Doctoral Scholars Retirement Program: [https://beav.es/oPd](https://beav.es/oPd)
3. Meet with one of OSU’s HR Retirement Officers (optional): [https://beav.es/5hz](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](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.