Roadmap to OSU’s Retirement Benefits: Academic and Professional Faculty

**FIRST 6 MONTHS OF EMPLOYMENT**

**Review OSU’s Retirement Benefits**
1. Voluntary Retirement Savings Plans:  [https://beav.es/oPf](https://beav.es/oPf)
2. Academic and Professional Faculty Retirement/Pension Plans:  [https://beav.es/oPY](https://beav.es/oPY)
3. Attend a **Retirement Choices & Resources Workshop**, offered monthly (optional):  [https://beav.es/oPg](https://beav.es/oPg)

**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/Pension Plan Notification**
If eligible, receive Retirement Plan Choice Notification to OSU email account in 5th month of employment.
- Review info in notification, including attachments.

**Elect/Enroll in an OSU Retirement/Pension Plan (required if eligible)**
Submit Retirement Election Form by deadline listed in Retirement/Pension Plan Notification, electing:
1. PERS OPSRP  
   **OR**
2. ORP

Roadmap to OSU’s Retirement Benefits: Academic and Professional Faculty updated September 2023