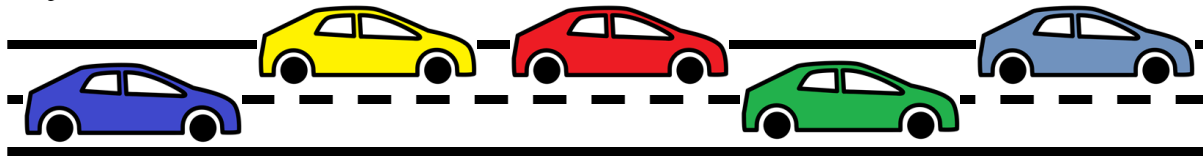




Oregon State  
University

# 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>
2. Academic and Professional Faculty Retirement/Pension Plans: <https://beav.es/oPY>
3. Attend a **Retirement Choices & Resources Workshop**, offered monthly (optional): <https://beav.es/oPg>
4. 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.fidelity.com/schedule](http://www.fidelity.com/schedule) | 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/Pension Plan Notification**

If eligible, receive Retirement Plan Choice Notification to OSU email account in **4th full 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