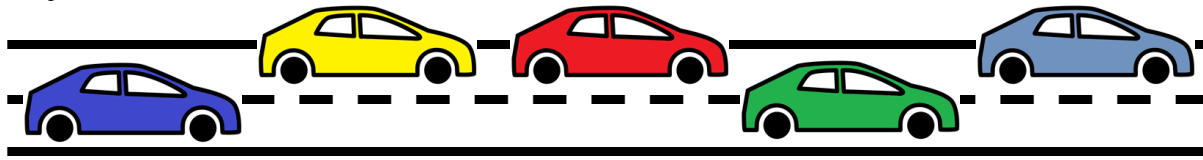




# Roadmap to OSU's Retirement Benefits: Post-Doctoral Scholar Employees



## ***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/oNx>

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

Meet with a financial/retirement planner at any time.

- Beyond Benefits: <https://beav.es/beyond-benefits>
- Fidelity Representative  
Justin Blatny, Director, Retirement Planner  
Email: [Justin.Blatny@fmr.com](mailto:Justin.Blatny@fmr.com) | Phone: 503-278-0414
- TIAA Representative  
Rebecca Rohleder, Financial Consultant | TIAA Financial Solutions  
Email: [rebecca.rohleder@tiaa.org](mailto:rebecca.rohleder@tiaa.org) | Phone: 503-265-3931

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

Enroll at any time during employment at OSU.

1. 403(b) Plan  
**AND/OR**
2. 457 Plan

### **Receive Retirement Plan Notification**

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