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/oNxA](https://beav.es/oNxA)

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

Meet with a financial/retirement planner at any time.
- Beyond Benefits:  [https://beav.es/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
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.