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.
  - **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**
    AJ Martinez, CFP and Ian Rothrock | TIAA Financial Solutions
    Email:  [OregonCounseling@Tiaa.org](mailto:OregonCounseling@Tiaa.org)

### 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 **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.