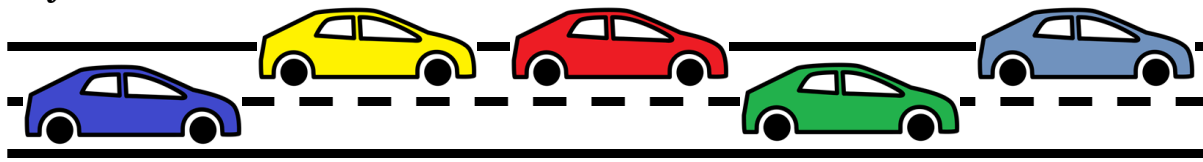




Roadmap to OSU's Retirement Benefits: Post-Doctoral Scholar Employees



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/5hz>

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 | Phone: 503-278-0414
- TIAA Representative
AJ Martinez, CFP and Ian Rothrock | TIAA Financial Solutions
Email: 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>
- AND/OR**
2. 457 Plan Enroll: 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.