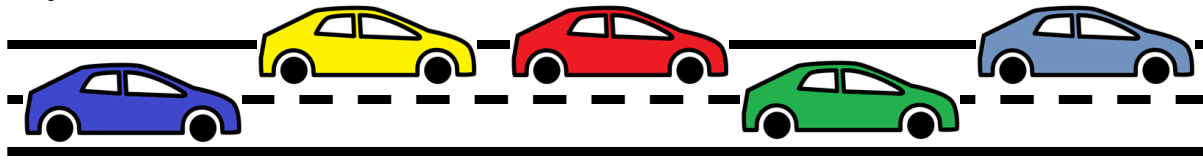




# Roadmap to OSU's Retirement Benefits: *Unclassified Employees*



## **FIRST 6 MONTHS OF EMPLOYMENT**

### **Review OSU's Retirement Benefits**

1. Voluntary Retirement Savings Plans: <https://beav.es/oPf>
2. Unclassified Employees Retirement/Pension Plan: <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/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/Pension Plan Notification**

If eligible, receive Retirement/Pension Plan Notification to OSU email account in **4th month of employment**.

- Review info in notification, including attachments.

### **Elect/Enroll in an OSU Retirement/Pension Plan** (*required if eligible*)

Submit *Retirement/Pension Election Form* by deadline listed in Retirement/Pension Plan Notification, electing:

1. PERS OPSRP  
**OR**
2. ORP