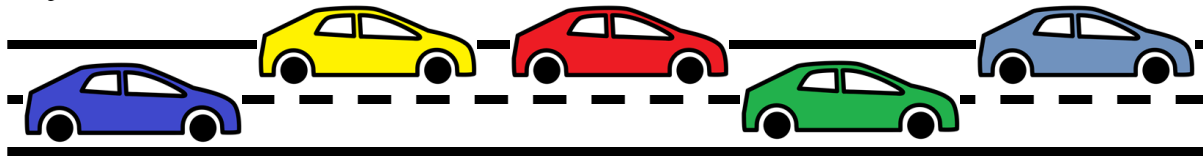




Roadmap to OSU's Retirement Benefits:

Academic and Professional Faculty



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/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/Pension Plan Notification

If eligible, receive Retirement Plan Choice 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 Election Form* by deadline listed in Retirement/Pension Plan Notification, electing:

1. PERS OPSRP
- OR**
2. ORP