Roadmap to OSU’s Retirement Benefits: Unclassified Employees

**FIRST 6 MONTHS OF EMPLOYMENT**

<table>
<thead>
<tr>
<th>Review OSU’s Retirement Benefits</th>
<th>Meet with a Financial/Retirement Planner (optional)</th>
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<tbody>
<tr>
<td>2. Unclassified Employees Retirement/Pension Plan: <a href="https://beav.es/oPY">https://beav.es/oPY</a></td>
<td>• Beyond Benefits: <a href="https://beav.es/beyond-benefits">https://beav.es/beyond-benefits</a></td>
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</table>
| 3. Attend a Retirement Choices & Resources Workshop, offered monthly (optional): [https://beav.es/oPg](https://beav.es/oPg) | • Fidelity Representative  
Justin Blatny, Director, Retirement Planner  
Email: Justin.Blatny@fmr.com | Phone: 503-278-0414 |
| 4. Meet with one of OSU’s HR Retirement Officers (optional): [https://beav.es/oNx](https://beav.es/oNx) | • TIAA Representative  
Rebecca Rohleder, Financial Consultant | TIAA Financial Solutions  
Email: rebecca.rohleder@tiaa.org | Phone: 503-265-3931 |

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<tr>
<th>Enroll in Voluntary Retirement Savings Plans (optional)</th>
<th>Receive Retirement/Pension Plan Notification</th>
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| Enroll at any time during employment at OSU.  
1. 403(b) Plan  
AND/OR  
2. 457 Plan | If eligible, receive Retirement/Pension Plan Notification to OSU email account in 4th month of employment.  
• Review info in notification, including attachments. |

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<tr>
<th>Elect/Enroll in an OSU Retirement/Pension Plan (required if eligible)</th>
<th>Submit Retirement/Pension Election Form by deadline listed in Retirement/Pension Plan Notification, electing:</th>
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</table>
| 1. PERS OPSRP  
OR  
2. ORP | 1. PERS OPSRP  
OR  
2. ORP |

Roadmap to OSU’s Retirement Benefits: Unclassified Employees updated September 2020