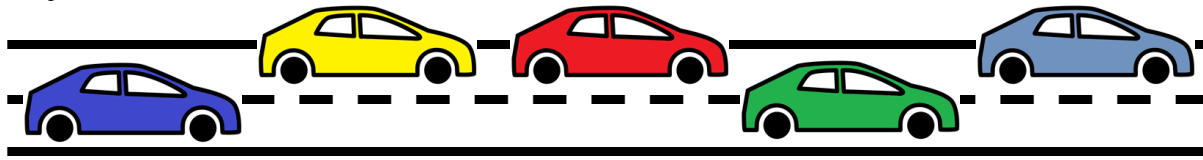




Roadmap to OSU's Retirement Benefits: *Unclassified Employees*



FIRST 6 MONTHS OF EMPLOYMENT

Review OSU's Retirement Benefits

1. Voluntary Retirement Savings Plans: <https://beav.es/oPf>
2. Unclassified Employees Retirement Plans: <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 | Phone: 503-278-0414
- TIAA Representative
Rebecca Rohleder, Financial Consultant | TIAA Financial Solutions
Email: 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 Plan Choice 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 Plan (*required if eligible*)

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

1. PERS OPSRP
OR
2. ORP