

How to Enroll in UCF Retirement Plans

Mandatory Retirement Plans		
Retirement Plan	Enrollment Deadline	How to Enroll
<p>FRS Pension Plan</p> <p>Eligible:</p> <ul style="list-style-type: none"> ✓ A&P ✓ Faculty ✓ USPS 	<p>Last business day of the 8th month following date of hire</p>	<p>USPS Employees:</p> <ul style="list-style-type: none"> • Complete EZ Retirement Plan Enrollment form • Fax or mail to FRS Plan Choice Administrator indicated on the form <p>A&P & Faculty Employees:</p> <ul style="list-style-type: none"> • Complete ORP-ENROLL form • Return ORP-ENROLL form to HR Benefits Section via fax (407-882-9022) or password protected email attachment (benefits@ucf.edu) • Complete EZ Retirement Plan Enrollment form • Fax or mail EZ Retirement Plan Enrollment form to FRS Plan Choice Administrator indicated on the form <p>Complete Beneficiary Designation Form</p> <p>FRS Pension Plan: https://www.rol.frs.state.fl.us/forms/ben-001.pdf</p> <p>FRS Investment Plan: https://www.myfrs.com/pdf/forms/ip_beneficiary.pdf</p>
<p>FRS Investment Plan</p> <p>Eligible:</p> <ul style="list-style-type: none"> ✓ A&P ✓ Faculty ✓ USPS 	<p>Last business day of the 8th month following date of hire</p> <p><i>*USPS Employees are automatically defaulted (with the exception of 'Special Risk' employees, who are automatically defaulted to the FRS Pension Plan).</i></p>	
<p>State University System Optional Retirement Program (SUSORP)</p> <p>Eligible:</p> <ul style="list-style-type: none"> ✓ A&P ✓ Faculty 	<p>90 days from hire date</p> <p><i>*Note: If you do not elect the SUSORP within 3 months (Date of Hire + 90 days) and you default into the Investment Plan, you can either remain in the Investment Plan or elect the Pension Plan by the end of the 8th month after your month of hire. Please note that Special Risk employees are defaulted to the Pension Plan and not the Investment Plan.</i></p>	<ul style="list-style-type: none"> • Open SUSORP account with one of the five SUSORP companies: <ul style="list-style-type: none"> ✓ AXA ✓ Metlife ✓ TIAA-CREF ✓ VALIC Retirement ✓ VOYA • <i>*ORP Contact information can be found here.</i> • Complete ORP-ENROLL form • <i>*Note: College of Medicine Faculty members and reemployed FRS Investment Plan or SUSORP retirees (who are eligible for the SUSORP) should complete the ORP-MANDATORY form in lieu of the ORP-ENROLL form (https://www.rol.frs.state.fl.us/forms/orp-mand.pdf)</i> • Return ORP-ENROLL form and confirmation of SUSORP account to HR Benefits Section via fax (407-882-9022) or password protected email attachment (benefits@ucf.edu).