

## How to Enroll in UCF Retirement Plans

Mandatory Retirement Plans		
Retirement Plan	Enrollment Deadline	How to Enroll
<p><b>FRS Pension Plan</b></p> <p><b>Eligible:</b></p> <ul style="list-style-type: none"> <li>✓ A&amp;P</li> <li>✓ Faculty</li> <li>✓ USPS</li> </ul>	<p>Last business day of the 5<sup>th</sup> month following date of hire</p> <p><i>*USPS Employees are automatically enrolled.</i></p>	<p><b>USPS Employees:</b></p> <ul style="list-style-type: none"> <li>• Not required to complete an enrollment form</li> </ul> <p><b>A&amp;P &amp; Faculty Employees:</b></p> <ul style="list-style-type: none"> <li>• Complete <a href="#">ORP-ENROLL</a> form</li> <li>• Return ORP-ENROLL form to HR Benefits Section via fax (407-882-9022) or password protected email attachment (<a href="mailto:benefits@ucf.edu">benefits@ucf.edu</a>).</li> <li>• Complete <a href="#">EZ Retirement Plan Enrollment</a> form</li> <li>• Fax or mail EZ Retirement Plan Enrollment form to FRS Plan Choice Administrator indicated on the form</li> </ul>
<p><b>FRS Investment Plan</b></p> <p><b>Eligible:</b></p> <ul style="list-style-type: none"> <li>✓ A&amp;P</li> <li>✓ Faculty</li> <li>✓ USPS</li> </ul>	<p>Last business day of the 5<sup>th</sup> month following date of hire</p>	<p><b>USPS Employees:</b></p> <ul style="list-style-type: none"> <li>• Complete <a href="#">EZ Retirement Plan Enrollment</a> form</li> <li>• Fax or mail to FRS Plan Choice Administrator indicated on the form</li> </ul> <p><b>A&amp;P &amp; Faculty Employees:</b></p> <ul style="list-style-type: none"> <li>• Complete <a href="#">ORP-ENROLL</a> form</li> <li>• Return ORP-ENROLL form to HR Benefits Section.</li> <li>• Complete <a href="#">EZ Retirement Plan Enrollment</a> form</li> <li>• Fax or mail EZ Retirement Plan Enrollment form to FRS Plan Choice Administrator indicated on the form</li> </ul>
<p><b>State University System Optional Retirement Program (SUSORP)</b></p> <p><b>Eligible:</b></p> <ul style="list-style-type: none"> <li>✓ A&amp;P</li> <li>✓ Faculty</li> </ul>	<p>90 days from hire date</p> <p><i>*Note: If you do not elect the SUSORP within 3 months (90 days) and you default into the Pension Plan, you can either remain in the Pension Plan or elect the Investment Plan by the end of the 5th month after your month of hire.</i></p>	<ul style="list-style-type: none"> <li>• Open SUSORP account with one of the five SUSORP companies: <ul style="list-style-type: none"> <li>✓ AXA</li> <li>✓ Metlife</li> <li>✓ TIAA-CREF</li> <li>✓ VALIC Retirement</li> <li>✓ VOYA</li> </ul> </li> <li>• <i>*ORP Contact information can be found <a href="#">here</a>.</i></li> <li>• Complete <a href="#">ORP-ENROLL</a> form</li> <li>• <i>*Note: College of Medicine Faculty members and reemployed FRS Investment Plan or SUSORP retirees (who are eligible for the SUSORP) should complete the <b>ORP-MANDATORY</b> form in lieu of the ORP-ENROLL form (<a href="https://www.rol.frs.state.fl.us/forms/orp-mand.pdf">https://www.rol.frs.state.fl.us/forms/orp-mand.pdf</a>)</i></li> <li>• Return ORP-ENROLL form and confirmation of SUSORP account to HR Benefits Section via fax (407-882-9022) or password protected email attachment (<a href="mailto:benefits@ucf.edu">benefits@ucf.edu</a>).</li> </ul>