

How to Enroll in UCF Retirement Plans

| Voluntary Retirement Plans | | |
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| Retirement Plan | Enrollment Deadline | How to Enroll |
| <p>Voluntary 403(b) Plan (Pre-Tax & ROTH)</p> <p>Eligible:</p> <ul style="list-style-type: none"> ✓ All employee classes including OPS. | <p>No enrollment deadline – can enroll any time.</p> | <ul style="list-style-type: none"> • Open a voluntary retirement account with one of the eight voluntary 403(b) companies: <ul style="list-style-type: none"> ✓ Fidelity ✓ TIAA ✓ VALIC <p><i>*Voluntary 403(b) company contact information can be found here.</i></p> • Complete the Salary Reduction Agreement (SRA) and attach a copy of the enrollment application (from the 403(b) company that the account has been opened with) as proof that the account has actually been opened. • Return the completed SRA and enrollment application to the Benefits Section via fax (407-882-9022) or password protected email attachment (benefits@ucf.edu). |
| <p>457 Deferred Compensation</p> <p>Eligible:</p> <ul style="list-style-type: none"> ✓ All employee classes including OPS. | <p>No enrollment deadline – can enroll any time.</p> | <ul style="list-style-type: none"> • Contact the State Office of Deferred Compensation: <ul style="list-style-type: none"> ✓ Telephone: (877) 299-8002 ✓ Website: www.myfloridaderferredcomp.com |