

Retirement Plan Election Form

1. Employee Information

Name (Last, First, Initial)	Social Security Number (required)	Date of Birth
University/Institution	Day Phone	Hire Date
Home Address		Eligibility Date

2. Your Retirement Plan (Choose One)

This is a one-time, irrevocable election that will apply during your entire OUS employment.

- 2A.** I elect to enroll in the **Oregon Public Service Retirement Plan (OPSRP)/Public Employees Retirement System (PERS)**.
Sign and date Section 4, and return this form to your campus benefits office.
- 2B.** I elect to enroll in the **Optional Retirement Plan (ORP)**. Complete Sections 3 and 4.
Do you currently have a PERS/OPSRP account? No Yes
If yes, you must also complete a PERS-to-ORP Transfer Form, available through your campus benefits office.

3. Your ORP Investment Company Choice (Choose One if you elected the ORP.)

- TIAA/CREF** (Teachers Insurance and Annuity Association/College Retirement Equity Fund)
You must send your TIAA-CREF application form or online application directly to TIAA-CREF to ensure your contributions are invested as you wish*. Date Application Sent: _____
- AIG VALIC Financial Advisors, Inc.**
You must return your AIG VALIC application form to your AIG VALIC advisor to ensure your contributions are invested as you wish*. Date Application Sent: _____
- American Century Investments**
You must send your American Century application form directly to American Century to ensure your contributions are invested as you wish*. Date Application Sent: _____
- Scudder Investments**
You must send your Scudder application form directly to Scudder to ensure your contributions are invested as you wish*. Date Application Sent: _____

4. Certification

I understand that the choice I make between the ORP and OPSRP/PERS is a one-time, irrevocable choice that will be effective as long as I am employed by the OUS, including future periods of employment or re-employment.

*I further understand that contributions sent to the investment company I selected (above) may be invested in that company's money market fund until the company receives my signed application form indicating my investment choice(s).

Signature

Date

Please return this form to your campus benefits office by the 10th of the month in which you are eligible to enroll in the retirement plans. Late return of this form will result in automatic PERS/OPSRP enrollment.