

ORP

ORP

Change Form



The University of Georgia

OPTIONAL RETIREMENT PLAN

You may change ORP companies up to four times in a calendar year. Your changes will become effective the month following receipt of your completed forms.

Form fields: UGA 810 #, LAST NAME, FIRST NAME, M I, CONTRACT TYPE (Academic or fiscal), DEPARTMENT, CAMPUS PHONE, EMPLOYMENT DATE, EMAIL ADDRESS

Individuals who participate in the Optional Retirement Plan (ORP) of the University System of Georgia may choose to change their ORP companies (among the four approved ORP vendors) up to four (4) times per calendar year.

Please designate your allocations with the following stipulations:

- Allocations must total 100%
• If divided, a minimum investment to any one company must be at least 10%
• All contributions must be on a whole number percentage basis
• You must submit this form to the Employee Benefits Department.

Allocation of total contribution

Company (check box)

Form for allocation: % Fidelity Investments, % TIAA-CREF, % VALIC, TOTAL 100 %

If choosing a new company, be sure to submit a copy of the company application with this form.

IMPORTANT: When requesting company applications from your chosen companies, you must specify "The University of Georgia Optional Retirement Plan 401(a) enrollment packet."

This agreement shall remain in force during my continued employment except as amended in writing by me. I understand I am responsible for all investment decisions regarding this plan.

I, the undersigned, do hereby certify I have read and fully understand the above statements regarding the University System of Georgia Optional Retirement Plan.

SIGNATURE, DATE

Send completed forms to: The University of Georgia Employee Benefits Human Resources Bldg. 215 S. Jackson St. Athens, GA 30602-4133