

ORP Change Form

Complete this form if you wish to change to another investment company within the Optional Retirement Plan.

1. Employee Information

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

2. Your ORP Investment Company Choice

You may direct ORP contributions to only one investment company at a time. You may change your election for future contributions only once during a calendar year. Once you choose a new company, you must complete and return the application form for your newly selected ORP investment company.

Current ORP Investment Company (name): _____

I wish to change my ORP investment company to (check):

- 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: _____
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3. Certification

I understand that this election will be effective until I change my selected ORP investment company in another calendar year.

*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 _____

You must provide this form to your campus benefits office by the 10th of the month in which you wish this change to be effective.

Retain a copy of your signed copy for your personal records.