



OPTIONAL RETIREMENT PLAN (ORP)

CHANGE OF ELECTION FORM

Provisions of the Optional Retirement Plan (ORP) allow current ORP participants to make an election change between ORP investment companies up to once per fiscal year, July 1 – June 30.

Please indicate your change of optional retirement plan below. **Additionally, you must complete an enrollment application to open an account with the company you have chosen.** Submit this election form **and** a copy of the enrollment application from your new vendor to Human Resources. If you wish to transfer any funds between the ORP investment companies, please contact those companies directly for information, instructions, and forms.

I elect a change in enrollment to the following optional retirement plan investment company. I understand that plan provisions permit one change in ORP company election per fiscal year, and that this change shall constitute the change permitted for the current fiscal year.

Fidelity Investments

Teachers Insurance and Annuity Association (TIAA)

Name (please print): _____

Employee ID Number: _____

Email Address: _____

Department: _____ Contact Phone: _____

Signature: _____ Date: _____

For office use only:

Plan code _____

Vesting date _____

Date entered _____

Entered by _____

Checked by _____