

Human Resources

Optional Retirement Plan (ORP) Investment Company Change

Name (print): _____ Employee ID#: _____

Important: Participants in the Optional Retirement Plan (ORP) may change ORP investment companies once per fiscal year (July 1 – June 30). Changes may only be made to one of the two approved ORP investment companies.

From which of the following companies are you changing? (check one)

- Fidelity
 TIAA

TO which of the following companies are you changing? (check one)

- Fidelity
 TIAA

How to Enroll:

1. Go to your chosen investment company's website (listed below). There you can set up your new account.
To complete your online enrollment you are required to make your investment allocations.
2. Enter appropriate Plan Code/Number of Access Code (listed below).
3. Follow the on screen instructions.
4. When enrollment is complete, you will be given a Confirmation Number, User ID, or Account Number.
Please include this number in the space provided below for verification purposes.

This form will not be accepted without complete information below.

5. Return this form to NAU Human Resources Department (Benefits)
Centennial Building (Bldg. 91) NAU Box 4113
Fax: 928-523-2220
Scan/email: nauhrbenefits@nau.edu

Fidelity: <https://nb.fidelity.com/public/nb/nau/home>

Plan Number 67444

TIAA: <http://www.tiaa.org/arizona>

Access Code AZQ193

Confirmation/Account Number, or User ID: _____

Signature: _____ Date: _____