

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 Investments  
 TIAA-CREF

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

- Fidelity Investments  
 TIAA-CREF

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: 928-523-7486  
Scan/email: [hr.contact@nau.edu](mailto:hr.contact@nau.edu)

Fidelity Investments: [www.mysavingsatwork.com/azorp](http://www.mysavingsatwork.com/azorp)

Plan Number 67444

TIAA-CREF: <http://www.tiaa.org/arizona/home>

Access Code AZQ193

Confirmation/Account Number, or User ID: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_