

401(a) ORP Vendor Allocation Change Form

Vendor allocation changes may be made 4 times per calendar year, at the first of each quarter (January 1, April 1, July 1 and October 1). To make a change to your ORP vendor allocation, complete the fields below and return to the KSU HR office by the 1st of the quarter in order to the change to take effect for that quarter.

I am a participant in the University System of Georgia Optional Retirement Plan (ORP) and request to change my vendor allocation according to the schedule below.

The total of my 6% contribution and the Institution's 9.24% contribution is to be paid to:

COMPANY	ALLOCATION % (of Total Contributions)
Fidelity	
TIAA-Cref	
Valic	
TOTAL	100 %

The percentage listed for each company must be greater than or equal to 10%. Fractional percentages are not allowed.

Effective Date of Change*

*(*Must be one of the following dates: January 1, April 1, July 1 or October 1)*

I certify I have completed the necessary account application(s) and set up my account(s) with the ORP Vendor(s) I have chosen above.

PRINT NAME

SOCIAL SECURITY #

SIGNATURE

DATE

To be completed by HR:

DATE RECEIVED BY HR: _____

VERIFY VENDOR ACCOUNT SET-UP

CHANGE ENTERED BY: _____

EFFECTIVE DATE OF CHANGE: _____

DATE ENTERED: _____