

**CSU-PUEBLO RETIREMENT PLAN ENROLLMENT FORM  
FACULTY AND NON-CLASSIFIED STAFF**

Name: \_\_\_\_\_ Social Security #: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Daytime Phone: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

As a condition of employment, you are required to participate in either the University's Defined Contribution Plan for Retirement (the University's DCP also called an Optional Retirement Plan or "ORP") or you may elect to participate in the Colorado Public Employees' Retirement Association Plan (PERA) provided you satisfy PERA's conditions for membership. To elect PERA as your retirement plan, you must be an active PERA participant with at least 12 months of service credit, an in-active member with that amount of service credit or a current PERA retiree. However, unless you are a PERA retiree, you may not elect PERA as your retirement plan if you have previously been employed by a public college or university in Colorado offering an "ORP" if during that employment you made an election to participate in that institution's ORP. In addition, if your election at that time was to participate in PERA, you may not now elect the ORP. Such elections are by law irrevocable. Effective January 1, 2011, present PERA retirees may elect either PERA or the ORP as their retirement plan each time they are reappointed. Any election to participate in PERA will require you to make the required employee or working retiree contribution to that Plan. ***Failure to return this completed form within 30 days of your date of eligibility will eliminate any option you might otherwise have had to select PERA. Further, if you fail to return a completed form within 90 days of your date of hire, you will be enrolled in one of the DCP investment companies in accordance with the default procedure established by the University.***

**Retirement Plan Election**

**Defined Contribution Plan (DCP)**

I elect to enroll in the DCP. I select the investment company checked below as the recipient of my DCP contributions until, and unless, I select another investment company during a future benefits open enrollment period.

**TIAA-CREF**

**VALIC**

**NOTE:** You must also complete the investment company application process to implement your choice of investment fund(s) and designate a beneficiary. All initial retirement plan contributions for DCP participants are placed in a non-interest bearing account until an investment company election or default election is made and entered into the University's payroll system in accordance with payroll deadlines.

-----Elect the disposition of your PERA account-----

I do **not** have a PERA account.

I do have a PERA account, and I elect the following option:

- Terminate membership and authorize PERA to transfer member contributions and interest earned to the ORP vendor designated above. I understand I waive all future PERA benefits as a result of this transfer. **NOTE:** 12 months of PERA service credit is required to elect disposition of your PERA Acct. PERA accounts for members with less than 12 months of service will automatically be transferred to the ORP.
- Terminate future contributions and maintain my PERA account for future retirement benefits. I will advise PERA of any change in my address.

**Public Employees' Retirement Association (PERA)**

I elect participation in the PERA retirement plan. I am presently an active participant in PERA with at least 12 months of service credit, an inactive member with the same level of service credit or a PERA retiree.

I understand and acknowledge that;

- All of the information on this form is true and accurate.
- My retirement plan election (DCP or PERA) indicated above is irrevocable for the duration of this appointment with the University and, unless I am a PERA retiree, for any future appointment in which participation in the University's retirement plan is required.
- Unless I am a current PERA retiree, I have not previously made an election to participate in either an ORP offered by a public college or university in Colorado or to participate in PERA. If such previous election was made, I understand that it was irrevocable and that I must make the same election at this time.
- If I have elected participation in PERA:
  - ✓ I understand that my signed election form must be returned within the 30 days from date of hire; and
  - ✓ I will contact PERA at (800) 759-7372 or at [www.copera.org](http://www.copera.org) to determine the benefits associated with participating in that retirement plan and, if I am now or have been a PERA retiree, the effect of electing PERA as my retirement plan during this period of employment. I understand that special provisions may apply to this period of PERA service and that PERA can advise me on those special provisions.
  - ✓ I understand that PERA is responsible for determining my eligibility for membership, not the University and if PERA determines that I am not eligible for membership at any time after I file this Retirement Plan Election, the University must enroll me in the DCP.
- If I am eligible to elect either PERA or the ORP and have elected to participate in the University's ORP, I will contact PERA at (800) 759-7372 or at [www.copera.org](http://www.copera.org) to determine my PERA account options.

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

..... *HR Use Only*  
 PERA Verification:  Yes  No per \_\_\_\_\_ at PERA on \_\_\_\_\_ Eligibility Date: \_\_\_\_\_