

## Optional Retirement Plan (ORP) Investment Company Change

Name (print): \_\_\_\_\_ Empl 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.

<p><b><u>From</u> which of the following companies are you changing? (check one)</b></p> <p><input type="checkbox"/> Fidelity Investments</p> <p><input type="checkbox"/> TIAA-CREF</p>	<p><b><u>TO</u> which of the following companies are you changing? (check one)</b></p> <p><input type="checkbox"/> Fidelity Investments</p> <p><input type="checkbox"/> TIAA-CREF</p>
---	---

**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 or 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

Fidelity Investments: [www.mysavingsatwork.com/azorp](http://www.mysavingsatwork.com/azorp)      Plan Number **67444**

TIAA-CREF: [www.tiaa-cref.org/azus](http://www.tiaa-cref.org/azus)      Access Code **AZQ193**

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

**Signature** \_\_\_\_\_      **Date** \_\_\_\_\_