



The University of North Carolina at Charlotte Retirement Plan Acknowledgement and Election Form

PLAN ELECTION

Select Option 1 or 2 below, sign, date, and return this form to the Benefits Office (King, Room 207).

OPTION 1 - Optional Retirement Program

I elect to enroll in the Optional Retirement Program and understand that I must complete this form and on-line enrollment within 60 days from the date of my eligibility to enroll.

- [ORP-1-Election and Forfeiture Agreement Form](#)
- On-line vendor enrollment (account set up/funding/beneficiary selections)
[Fidelity](#) (www.netbenefits.com/unc) or [TIAA](#) (www.tiaa-cref.org/unc)

OPTION 2 - Teachers’ and State Employees’ Retirement System

I elect to enroll in the Teachers’ and State Employees’ Retirement System and understand that I need to complete the following forms to name beneficiary(ies) for my account:

- [TSERS Beneficiary Form - 2C](#)

You can update your beneficiaries on line once TSERS has received your retirement funds and established your account at www.myncretirement.com ([TSERS/Orbit](#)) website .

ACKNOWLEDGEMENT	
As a new employee, I acknowledge the following regarding my retirement plan election:	
<ul style="list-style-type: none"> • I must choose to participate in either the Optional Retirement Plan (ORP) or the North Carolina Teachers’ and State Employees’ Retirement System (TSERS); • I have 60 days from the date of eligibility to make this choice; • Failure to make an election within 60 days will result in a default enrollment into TSERS; • Once I make my election (or default election), it is irrevocable and unchangeable. 	
Print Name :	University ID Number:
Signature:	Date: