

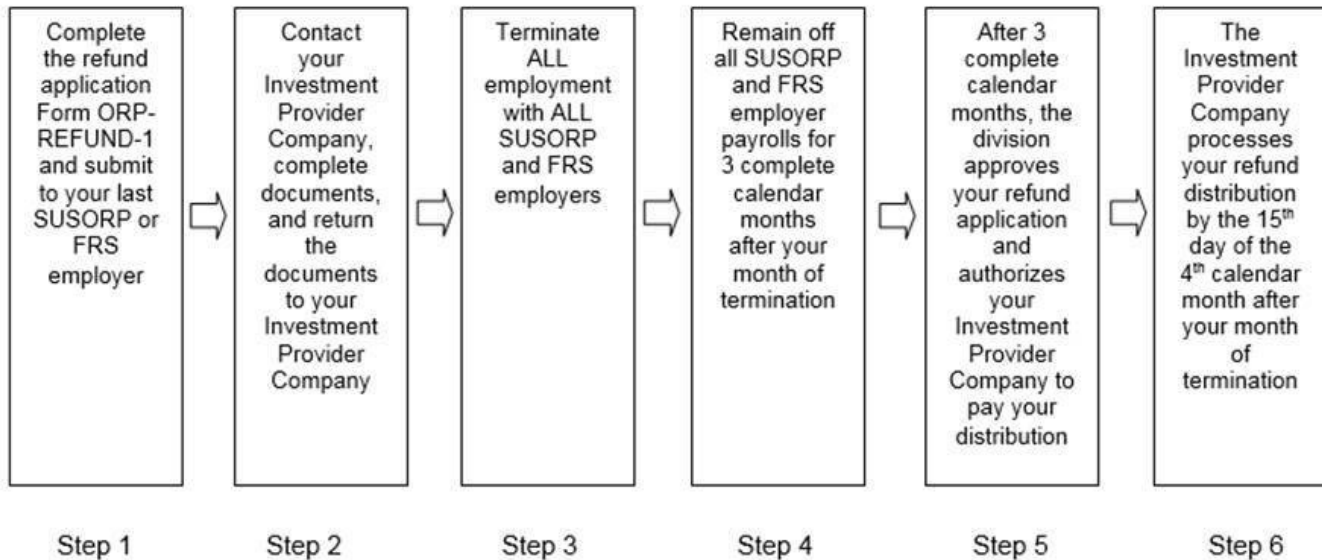
State University System Optional Retirement Program (SUSORP)
Application for Refund of Voluntary Employee Contributions Only Information Page

Division of Retirement – Optional Unit
PO Box 9000 Tallahassee, Florida 32315-9000
Phone: 850-778-4696 Toll-free: 877-378-7677 FAX: 850-410-2030
Email: orpdata@dms.MyFlorida.com

When to use Form ORP-REFUND-1:

To apply for a refund of **only** your voluntary employee contributions under the SUSORP. A refund is not a retirement distribution; therefore, reemployment limitations do not apply.

Refund Application Process:



An Explanation of Steps 1 through 6:

Step 1 – Complete the Refund Application

- Complete Sections I and II of the Form ORP-REFUND-1 and have your signature notarized.
- Submit Form ORP-REFUND-1 to your last SUSORP employer or last FRS employer.
- Your last employer will certify and forward the Form ORP-REFUND-1 to the Division of Retirement (the division).

Step 2 – Contact Your Investment Provider Company

- Request the distribution documents from your Investment Provider Company.
- Return the completed documents to your Investment Provider Company.
- **DO NOT** forward the Investment Provider Company's documents to the division. The division does not sign your Investment Provider Company forms.
- The division will authorize your distribution by sending your approved application to your Investment Provider Company (see Step 5).

Step 3 – Terminate Your Employment

- Like FRS members, SUSORP members must terminate from employment from all SUSORP and FRS employers to be eligible for a refund.
- If you work for more than one participating employer, even in a **temporary position**, you must terminate employment from each employer offering the following retirement plans:
 - State University System Optional Retirement Plan (SUSORP),
 - Florida Retirement System (FRS),
 - State Community College System Optional Retirement Program (SCCSORP), and
 - Senior Management Service Optional Annuity Program (SMSOAP).

Step 4 – Remain Off All SUSORP and FRS Employer Payrolls

- **Before receiving a refund distribution**, you must be terminated for three complete calendar months as provided in section 121.035(5)(g), Florida Statutes.

Step 5 – Division Approval of Your Refund Application

- The division will check each month to verify that you have remained off all SUSORP and FRS employer payrolls for three complete calendar months to meet the termination requirement.
- After verification is completed, the division will forward your approved application to your Investment Provider Company to authorize your distribution.

Step 6 – Your Investment Provider Company Processes Your Distribution

- Your Investment Provider Company cannot distribute your funds until the fourth calendar month following your month of termination.
- Your distribution should be processed by the 15th day of the fourth calendar month. If you have not received your distribution by the 20th day of the fourth calendar month, contact your Investment Provider Company.

If you have any questions, please contact the Division of Retirement toll-free at 877-378-7677 or via email at orpdata@dms.MyFlorida.com.

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I. Member Information

Member Name: _____ Member SSN: _____
Home Mailing Address: _____

Email Address: _____
Home Phone: _____ Cell Phone: _____

II. Member Certification

I understand:

- I am applying for a refund of **Voluntary Employee Contributions only** under the SUSORP.
- I must terminate from all employment relationships with all SUSORP and all Florida Retirement System (FRS) employers for three (3) complete calendar months to be eligible for a refund distribution.
- A refund of voluntary employee contributions is not considered a retirement distribution.

Member Signature (sign in the presence of a notary): _____

Notary: In the State of _____, County of _____, the above named person, who has sworn to and subscribed before me this _____ day of _____, in the year of _____, and who is personally known _____ or produced _____ identification.

Signature of Notary Public - State of _____

Print/Stamp Commissioned Name of Notary Public

III. Employer Certification

This is to certify that the above named member was employed by this agency and will terminate on _____ or has terminated on _____.

Agency Authorized Signature: _____ Date signed: _____

Agency Name: _____

Agency Number: _____ Agency Phone: _____

IV. Division Authorization for Investment Provider Company to process a Refund Distribution

Termination verified

Refund Distribution approved. Eligibility date: Month ___ Day ___ Year ____

Approved by _____ Date _____

SUSORP Employing Agencies Contact Information

FLORIDA A & M UNIVERSITY	Address: 211 Foote-Hilyer Administration Center Tallahassee, FL 32307-0001 Phone: 850-599-3611 Fax: 850-599-3367 Email: shauna.robinson@famu.edu
FLORIDA ATLANTIC UNIVERSITY	Address: 777 Glades Rd IS-4 Rm 233 Boca Raton, FL 33431-0091 Phone: 561-297-3057 Fax: 561-297-4220 Email: benefits@fau.edu
FLORIDA GULF COAST UNIVERSITY	Address: 10501 FGCU Boulevard South Fort Myers, FL 33965-6565 Phone: 239-590-1400 Fax: 239-590-1431 Email: hr@fgcu.edu
FLORIDA INTERNATIONAL UNIVERSITY	Address: 11200 SW 8th Street PC 224 Miami, FL 33199-0001 Phone: 305-348-2181 Fax: 305-348-6462 Email: benefits@fiu.edu
FLORIDA POLYTECHNIC UNIVERSITY	Address: 4700 Research Way Lakeland, FL 33805-8531 Phone: 863-874-8421 Fax: 863-874-8889 Email: ddoll@floridapoly.edu
FLORIDA STATE UNIVERSITY	Address: A6200 University Center Tallahassee, FL 32306-2410 Phone: 850-644-6034 Fax: 850-645-9509 Email: retirement@fsu.edu
NEW COLLEGE OF FLORIDA	Address: 5800 Bay Shore Road (PMC) Sarasota, FL 34243-2101 Phone: 941-487-4663 Fax: 941-487-5021 Email: benefits@ncf.edu
UNIVERSITY OF CENTRAL FLORIDA	Address: 3280 Progress Drive, Suite 100 Orlando, FL 32826-3229 Phone: 407-823-2771 Fax: 407-882-9022 Email: benefits@ucf.edu
UNIVERSITY OF FLORIDA	Address: 903 W University Ave Gainesville, FL 32601-5117 Phone: 352-392-2477 Fax: 352-392-5166 Email: benefits@ufl.edu
UNIVERSITY OF NORTH FLORIDA	Address: 1 Univ Of N Florida Dr Jacksonville, FL 32224-7699 Phone: 904-620-2903 Fax: 904-620-2742 Email: hr@unf.edu
UNIVERSITY OF SOUTH FLORIDA	Address: 4202 E Fowler Ave, SVC 2172 Tampa, FL 33620-0001 Phone: 813-974-2970 Fax: 813-974-5227 Email: Benefits@usf.edu
UNIVERSITY OF WEST FLORIDA	Address: Bldg. 20 East, 11000 University Parkway Pensacola, FL 32514-5750 Phone: 850-474-6030 Fax: 850-857-6030 Email: hr@uwf.edu

Provider Company Contact Information

AIG (VALIC)	Toll Free: 800-987-1143
Equitable (AXA)	Toll Free: 800-528-0204, Option 1
TIAA	Toll Free: 800-842-2776
Voya (ING)	Toll Free: 800-584-6001
Brighthouse Financial	Toll Free: 1-800-842-9406; 1-833-208-3018
Empower (Great West)	Toll Free: 800-701-8255
Nationwide (Jefferson national)	Toll Free: 866-667-0561

Optional Retirement and Refund Distribution Eligibility Chart

If You Terminate Employment in the Month of:	You Must Remain off All Employer Payrolls for the Following Three (3) Calendar Months.	You are Eligible to Receive a Distribution As Of:
December 2018	January 2019, February 2019, March 2019	April 1, 2019
January 2019	February 2019, March 2019, April 2019	May 1, 2019
February 2019	March 2019, April 2019, May 2019	June 1, 2019
March 2019	April 2019, May 2019, June 2019	July 1, 2019
April 2019	May 2019, June 2019, July 2019	August 1, 2019
May 2019	June 2019, July 2019, August 2019	September 1, 2019
June 2019	July 2019, August 2019, September 2019	October 1, 2019
July 2019	August 2019, September 2019, October 2019	November 1, 2019
August 2019	September 2019, October 2019, November 2019	December 1, 2019
September 2019	October 2019, November 2019, December 2019	January 1, 2020
October 2019	November 2019, December 2019, January 2020	February 1, 2020
November 2019	December 2019, January 2020, February 2020	March 1, 2020
December 2019	January 2020, February 2020, March 2020	April 1, 2020
January 2020	February 2020, March 2020, April 2020	May 1, 2020
February 2020	March 2020, April 2020, May 2020	June 1, 2020
March 2020	April 2020, May 2020, June 2020	July 1, 2020
April 2020	May 2020, June 2020, July 2020	August 1, 2020
May 2020	June 2020, July 2020, August 2020	September 1, 2020
June 2020	July 2020, August 2020, September 2020	October 1, 2020
July 2020	August 2020, September 2020, October 2020	November 1, 2020
August 2020	September 2020, October 2020, November 2020	December 1, 2020
September 2020	October 2020, November 2020, December 2020	January 1, 2021
October 2020	November 2020, December 2020, January 2021	February 1, 2021
November 2020	December 2020, January 2021, February 2021	March 1, 2021
December 2020	January 2021, February 2021, March 2021	April 1, 2021
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March 2021	April 2021, May 2021, June 2021	July 1, 2021
April 2021	May 2021, June 2021, July 2021	August 1, 2021
May 2021	June 2021, July 2021, August 2021	September 1, 2021
June 2021	July 2021, August 2021, September 2021	October 1, 2021
July 2021	August 2021, September 2021, October 2021	November 1, 2021
August 2021	September 2021, October 2021, November 2021	December 1, 2021
September 2021	October 2021, November 2021, December 2021	January 1, 2022
October 2021	November 2021, December 2021, January 2022	February 1, 2022
November 2021	December 2021, January 2022, February 2022	March 1, 2022