

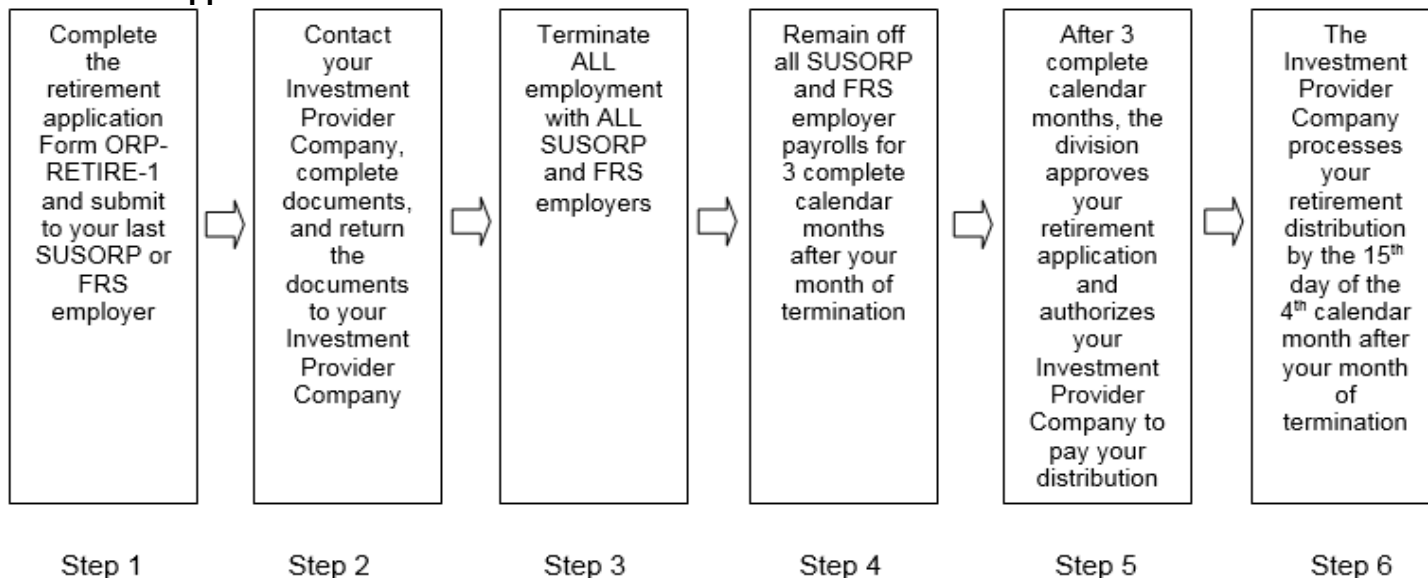
**State University System Optional Retirement Program (SUSORP)
Application for a Retirement Distribution Information Page**

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-RETIRE-1:

To apply for a retirement distribution under the SUSORP. Once you take a retirement distribution from your SUSORP account, you are considered a RETIREE and are subject to certain termination requirements and reemployment limitations during the first 12 calendar months following your initial retirement distribution date as provided in Subsection 121.091(9), Florida Statutes.

Retirement Application Process:



An Explanation of Steps 1 through 6:

Step 1 – Complete the Retirement Application

- Complete Sections I and II of the Form ORP-RETIRE-1 and have your signature notarized.
- Submit Form ORP-RETIRE-1 and required birth verification (see information page 2) to your last SUSORP or FRS employer.
- Your last employer will certify and forward the Form ORP-RETIRE-1 and your birth verification 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. There may be tax penalties if you access the funds prior to age 59-1/2.
- **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 retirement.
- 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 retirement distribution**, you must be terminated for three complete calendar months as provided in section 121.021(39), Florida Statutes.
- **After receiving a retirement distribution**, you must remain off all SUSORP and FRS employer payrolls for an additional six complete calendar months to finalize your retirement.

Step 5 – Division Approval of Your Retirement 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.

Normal Retirement Date:

- You may receive a retirement distribution at any age, however, if you have reached your Normal Retirement Date (as determined below), you will be eligible to receive up to 10 percent of your SUSORP account balance after terminating employment from all SUSORP and FRS employers for one full calendar month.
- Normal Retirement Date refers to the date in which you attain normal retirement by age, which is determined as follows:
 1. If initially enrolled in SUSORP before July 1, 2011, it is the first day of the month you attain age 62 (birth verification is required); or
 2. If initially enrolled in SUSORP on or after July 1, 2011, it is the first day of the month you attain age 65 (birth verification is required).

Acceptable Birth Verification for Normal Retirement Date: (Submit copies only. Originals will not be returned.)

Birth certificate registered with Vital Statistics in state of birth	Census report more than 30 years old	Life insurance policy more than 30 years old
Delayed birth certificate	Certificate of Naturalization	Valid, unexpired U.S. passport
If receiving Social Security benefits, a benefits letter from the Social Security Administration stating that the date of birth it has established for the payment of benefits.		Florida driver's license issued after January 1, 2010 that indicates compliance with the federal REAL ID Act

Termination Requirements and Reemployment Limitations:

- You must remain off all SUSORP and FRS employer payrolls for six complete calendar months after the month of distribution to finalize your retirement.
- If you become employed with a SUSORP or FRS employer between the 7th and 12th calendar months following your month of distribution, you are ineligible to receive additional distributions paid directly to you or as a roll-over during this period.

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 retirement by requesting a **Retirement Distribution** 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 retirement distribution.
- I will not be eligible for reemployment in any capacity by any participating SUSORP or FRS employer during the 1st through the 6th calendar month after my retirement distribution date.
- If I am employed during the 7th through 12th calendar month after my retirement distribution date by a participating SUSORP or FRS employer, I will not be able to receive any additional SUSORP distributions paid directly to me or as a roll-over to a qualified retirement plan during this period.
- If I have reached my **Normal Retirement Date**, I can request an early distribution of up to 10% of my SUSORP account balance after one (1) calendar month following my month of termination.

I am requesting an early distribution (up to 10%) based on Normal Retirement and am including the required birth verification with my application. INITIAL HERE: _____

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 Retirement Distribution

Termination verified

Early Distribution (up to 10% of SUSORP Account Balance) approved. Eligibility date: Month ___ Day ___ Year ____

Approved by _____ Date _____

Regular Retirement 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: hr@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: PO Box 115007 Gainesville, FL 32611-5007 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 FRS Employer Payrolls For The Following Three (3) Calendar Months.	You are Eligible to Receive A Distribution As Of:
December 2021	January 2022, February 2022, March 2022	April 1, 2022
January 2022	February 2022, March 2022, April 2022	May 1, 2022
February 2022	March 2022, April 2022, May 2022	June 1, 2022
March 2022	April 2022, May 2022, June 2022	July 1, 2022
April 2022	May 2022, June 2022, July 2022	August 1, 2022
May 2022	June 2022, July 2022, August 2022	September 1, 2022
June 2022	July 2022, August 2022, September 2022	October 1, 2022
July 2022	August 2022, September 2022, October 2022	November 1, 2022
August 2022	September 2022, October 2022, November 2022	December 1, 2022
September 2022	October 2022, November 2022, December 2022	January 1, 2023
October 2022	November 2022, December 2022, January 2023	February 1, 2023
November 2022	December 2022, January 2023, February 2023	March 1, 2023
December 2022	January 2023, February 2023, March 2023	April 1, 2023
January 2023	February 2023, March 2023, April 2023	May 1, 2023
February 2023	March 2023, April 2023, May 2023	June 1, 2023
March 2023	April 2023, May 2023, June 2023	July 1, 2023
April 2023	May 2023, June 2023, July 2023	August 1, 2023
May 2023	June 2023, July 2023, August 2023	September 1, 2023
June 2023	July 2023, August 2023, September 2023	October 1, 2023
July 2023	August 2023, September 2023, October 2023	November 1, 2023
August 2023	September 2023, October 2023, November 2023	December 1, 2023
September 2023	October 2023, November 2023, December 2023	January 1, 2024
October 2023	November 2023, December 2023, January 2024	February 1, 2024
November 2023	December 2023, January 2024, February 2024	March 1, 2024
December 2023	January 2024, February 2024, March 2024	April 1, 2024
January 2024	February 2024, March 2024, April 2024	May 1, 2024
February 2024	March 2024, April 2024, May 2024	June 1, 2024
March 2024	April 2024, May 2024, June 2024	July 1, 2024
April 2024	May 2024, June 2024, July 2024	August 1, 2024
May 2024	June 2024, July 2024, August 2024	September 1, 2024
June 2024	July 2024, August 2024, September 2024	October 1, 2024
July 2024	August 2024, September 2024, October 2024	November 1, 2024
August 2024	September 2024, October 2024, November 2024	December 1, 2024
September 2024	October 2024, November 2024, December 2024	January 1, 2025
October 2024	November 2024, December 2024, January 2025	February 1, 2025
November 2024	December 2024, January 2025, February 2025	March 1, 2025

Optional Reemployment Limitations Chart

If You Take a Distribution in the Month of:	You Must Remain off All Employer Payrolls for the Following Six (6) Calendar Months.	If You Reemploy During Calendar Months 7-12, You Will Be Ineligible for Distributions.	After the 12 th Calendar Month, Reemployment Limitations No Longer Apply.
July 2021	August 2021-January 2022	February 2022- July 2022	Effective August 2022
August 2021	September 2021-February 2022	March 2022- August 2022	Effective September 2022
September 2021	October 2021-March 2022	April 2022-September 2022	Effective October 2022
October 2021	November 2021-April 2022	May 2022-October 2022	Effective November 2022
November 2021	December 2021-May 2022	June 2022-November 2022	Effective December 2022
December 2021	January 2022-June 2022	July 2022-December 2022	Effective January 2023
January 2022	February 2022-July 2022	August 2022-January 2023	Effective February 2023
February 2022	March 2022-August 2022	September 2022-February 2023	Effective March 2023
March 2022	April 2022-September 2022	October 2022-March 2023	Effective April 2023
April 2022	May 2022-October 2022	November 2022-April 2023	Effective May 2023
May 2022	June 2022-November 2022	December 2022-May 2023	Effective June 2023
June 2022	July 2022-December 2022	January 2023-June 2023	Effective July 2023
July 2022	August 2022-January 2023	February 2023- July 2023	Effective August 2023
August 2022	September 2022-February 2023	March 2023- August 2023	Effective September 2023
September 2022	October 2022-March 2023	April 2023-September 2023	Effective October 2023
October 2022	November 2022-April 2023	May 2023-October 2023	Effective November 2023
November 2022	December 2022-May 2023	June 2023-November 2023	Effective December 2023
December 2022	January 2023-June 2023	July 2023-December 2023	Effective January 2024
January 2023	February 2023-July 2023	August 2023-January 2024	Effective February 2024
February 2023	March 2023-August 2023	September 2023-February 2024	Effective March 2024
March 2023	April 2023-September 2023	October 2023-March 2024	Effective April 2024
April 2023	May 2023-October 2023	November 2023-April 2024	Effective May 2024
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July 2023	August 2023-January 2024	February 2024- July 2024	Effective August 2024
August 2023	September 2023-February 2024	March 2024- August 2024	Effective September 2024
September 2023	October 2023-March 2024	April 2024-September 2024	Effective October 2024
October 2023	November 2023-April 2024	May 2024-October 2024	Effective November 2024
November 2023	December 2023-May 2024	June 2024-November 2024	Effective December 2024
December 2025	January 2024-June 2024	July 2024-December 2024	Effective January 2025
January 2024	February 2024-July 2024	August 2024-January 2025	Effective February 2025
February 2024	March 2024-August 2024	September 2024-February 2025	Effective March 2025
March 2024	April 2024-September 2024	October 2024-March 2025	Effective April 2025
April 2024	May 2024-October 2024	November 2024-April 2025	Effective May 2025
May 2024	June 2024-November 2024	December 2024-May 2025	Effective June 2025
June 2024	July 2024-December 2024	January 2025-June 2025	Effective July 2025

STATE UNIVERSITY SYSTEM OPTIONAL RETIREMENT PROGRAM TERMINATION AND REEMPLOYMENT AFTER RETIREMENT

Toll Free: 877-378-7677 Locally: 850-778-4696 Email: Orpdata@dms.fl.gov

To begin receiving a State University System Optional Retirement Program (SUSORP) retirement benefit, you must terminate all employment relationships with and cease providing services to all FRS employers, including all State Universities for three full calendar months. After being terminated for three calendar months and taking a distribution, you are a retiree. However, you are not considered retired if you receive a Required Minimum Distribution (RMD) or a refund of only your voluntary SUSORP employee contributions. If you are dually employed with one or more FRS employers, you must terminate from all positions, even if one of those positions is not an FRS-covered position. You must terminate from all positions that include, but are not limited to:

- full time work
- part time work
- other personal services (OPS)
- election poll work
- substitute teaching
- adjunct instructing
- contractual services
- third-party companies providing services to FRS employers

Beginning July 1, 2023, Volunteer Services in accordance with section 121.091(15), Florida Statutes do not constitute employment by or provision of services to an FRS employer.

You are subject to the following termination requirement and reemployment restriction in the first 12 calendar months from your initial distribution date:

TERMINATION REQUIREMENT: 1st through 6th calendar months

During the first six calendar months following your initial distribution date, which does not include the month of the initial distribution, you cannot be in an employment relationship with and must cease providing services to all FRS employers. An employment relationship with an FRS employer in any capacity during this six-calendar month period may void your retirement and you and your FRS employer may be held jointly and severally liable for repayment of all retirement benefits received. This means that each party can be held fully responsible for the repayment of the total amount of retirement benefits. **There are no exceptions to the six-calendar month termination requirement.**

Example of a violation:

- You terminate from FRS employment on July 31 and receive a retirement distribution from your State University System Optional Retirement Program (SUSORP) account in November. Your six-calendar month termination period is from December to May. You become employed with an FRS employer in January. This employment voided your retirement. Your retirement benefits are voided, and you and your FRS employer will be held jointly and severally liable to repay all retirement benefits you received.

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REEMPLOYMENT RESTRICTION: 7th through 12th calendar months

During the 7th through 12th calendar months following your distribution date, you may engage in an employment relationship with or provide services to an FRS employer if, and only if, you suspend all distributions from your SUSORP account. If your SUSORP distributions are not suspended, you and your employer will be held jointly and severally liable for repayment of all retirement benefits received during the months in which you were employed. An exception to the reemployment restriction is provided for retired law enforcement officers reemployed as school resource officers in accordance with section 121.091(9)(f), Florida Statutes. If you provide services to an FRS employer in any capacity, you **MAY** be determined to have an employment relationship.

Example of a suspension of benefits:

- You terminate from all FRS employment on September 30 and receive a distribution from your SUSORP account in January. Your 7th through 12th calendar month period is from August to the following January. You become employed with an FRS employer in August. All SUSORP distributions must be suspended from August through the following January. Your SUSORP distributions may resume in February when you reach your 13th calendar month of retirement.

If you are in an employment relationship with or provide services to an FRS employer during the 7th through 12th calendar months from your SUSORP distribution month, you must notify your provider company to suspend your benefits. If you are providing volunteer services to an FRS employer in accordance with section 121.091(15), Florida Statutes, you and your employer are both required to maintain adequate records to document adherence to the criteria listed in the statute.

Beginning with the 13th calendar month following your SUSORP distribution date, there are no restrictions on working for an FRS employer.

For more information about the effects of reemployment on your SUSORP benefits, visit our website, frs.myflorida.com, where you can view our "[READY.SET.RETIRE.](#)" guide that further explains the FRS reemployment provisions.

Disclaimer:

As much as possible, this guide is written in nontechnical terms, avoiding the formal language of retirement laws and rules. If questions of interpretation arise as a result of the attempt to make the retirement provisions easy to understand, Chapter 121 of the Florida Statutes and chapter 60S of the Florida Administrative Code, and applicable federal law remain the final authority.