

**State University System Optional Retirement Program (SUSORP)
Application for a Required Minimum 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-RMD-1:

To apply for a Required Minimum Distribution (RMD) from the SUSORP. An RMD is not a retirement distribution; therefore, reemployment limitations do not apply.

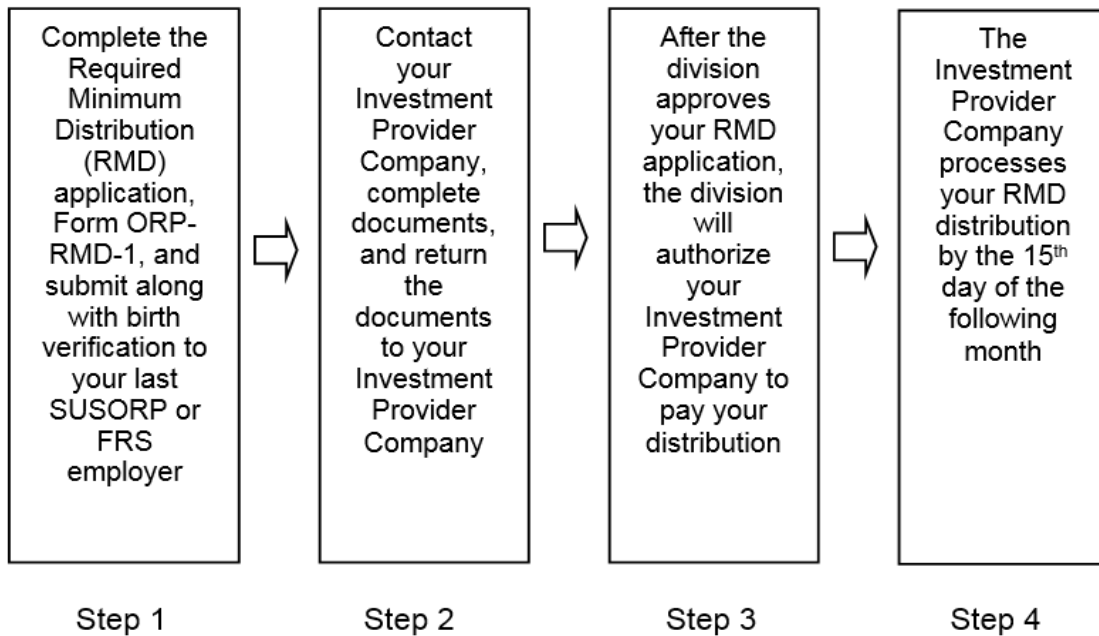
RMD Eligibility Requirements:

To be eligible for an RMD:

- You must be age 70½ (birth verification is required).
- You must be terminated from all employment relationships with all SUSORP and all Florida Retirement System (FRS) employers.

Both requirements must be fulfilled before a distribution can be approved. Once you have met the requirements, you will immediately be eligible for an RMD.

RMD Application Process:



An Explanation of Steps 1 through 4:

Step 1 – Complete the Retirement Application

- Complete Sections I and II of the Form ORP-RMD-1 and have your signature notarized.
- Submit Form ORP-RMD-1 and required birth verification (see information page 2) to your last SUSORP employer or FRS employer.
- Your last employer will certify and forward the Form ORP-RMD-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.
- **Do not** forward the Investment Provider Company's documents to the division. The division does not sign Investment Provider Company forms.
- The division will authorize your distribution by sending your approved application to your Investment Provider Company (see Step 3).

Step 3 – Division Approval of Your RMD Application

- After verification is complete, the division will forward your approved application to your Investment Provider Company to authorize your distribution.

Step 4 – Your Investment Provider Company Processes Your Distribution

- Your distribution should be processed by the 15th day of the following month. If you have not received your distribution by the 20th day of the following month, contact your Investment Provider Company.

Acceptable Birth Verification for Required Minimum Distribution:

RMD applicants must provide birth verification with the Form ORP-RMD-1 to the Division of Retirement before a distribution can be authorized. **(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

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 Required Minimum Distribution (RMD)** under the SUSORP based on being at least age 70½ and am including the **required** birth verification with my application.
- I cannot receive a RMD from my SUSORP account until I am terminated from all employment relationships with all SUSORP and all Florida Retirement System (FRS) employers.
- I can request an RMD from my SUSORP retirement funds immediately after termination.
- A Required Minimum Distribution is not considered a retirement distribution.
- I cannot receive further distributions from my SUSORP account if I become employed by a participating SUSORP or FRS employer after receiving my RMD.

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 RMD Distribution

Termination verified

Required Minimum Distribution (RMD) approved. Eligibility date: 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