The University of North Carolina at Charlotte
Retirement Plan Acknowledgement and Election Form
For Newly Eligible Active Employees

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
the following form and on-line enrollment within 60 days from the date of my eligibility
to enroll.
  • Optional Retirement Program
    o Under Forms, select ORP-1 (Election and Forfeiture Agreement)
  • On-line vendor enrollment (account set up/funding/beneficiary selections)
    o Fidelity (www.netbenefits.com/unc)
    o TIAA (www.tiaa-cref.org/unc)

☐ OPTION 2 - Teachers’ and State Employees’ Retirement System
I elect to continue enrollment in the Teachers’ and State Employees’ Retirement System
and understand that I may need to complete the following forms to name/update
beneficiary(ies) for my account:
  • Form 2C - Designating Beneficiary(ies)
  • You can update your beneficiaries on line at: www.myncretirement.com/ORBIT.

ACKNOWLEDGEMENT
As a newly eligible employee, I acknowledge the following regarding my retirement plan
election:
  • I have the option to enroll in either the Optional Retirement Plan (ORP) or remain in 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 to remain in TSERS;
  • Once I make my election (or default election), it is irrevocable and unchangeable.

Print Name: ___________________________ University ID Number: ___________________________
Signature: ___________________________ Date: ___________________________