Your Retirement Plan Investment Options

To::
UA Employees
Names and titles:
Division of Human Resources

Date::
February 15, 2018

As part of our commitment to offer you the best possible opportunities for your financial future, we recently completed a year-long review process of the Optional Retirement Plan (ORP) and Voluntary 403(b) Plan. Division of Human Resources and UA faculty representatives performed this review in partnership with Arizona State University, Northern Arizona University, the Arizona Board of Regents, and financial advisors at CAPTRUST.

In the next few days, current and past participants of the ORP and the Voluntary 403(b) Plan will receive a letter at their home address from the Arizona University System, announcing revisions to some of the current investment options in the ORP and 403(b) fund lineups. These changes will lead to more consistency between the two plans, lower fees, better returns, and more diversity in your investment choices. View the letter on the Human Resources website.

If you have an ORP or 403(b) Plan account, no action is required on your part at this time. However, please review the letter for more details on what is changing and how you may be affected.

Want to learn more?
Visit the Division of Human Resources website to:

- Register to attend an information session or webinar.
- Schedule a time to meet with a representative from TIAA or Fidelity Investments, and review your account.
- Review the frequently asked questions.

If you have any further questions, please email hrsolutions@email.arizona.edu or call:

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