



BOARD OF REGENTS OF
THE UNIVERSITY SYSTEM OF GEORGIA

VENDOR ALLOCATION CHANGE FORM

Vendor allocation changes may be made four (4) times per calendar year, at the first of each quarter (January 1, April 1, July 1, and October 1). To make changes to your ORP vendor allocation, complete the fields below and return to your Human Resources Representative by the 1st of the quarter.

I am a participant in University System of Georgia Optional Retirement Plan (ORP) and request to change my vendor allocation according to the schedule below. The total of my 5% and the Board of Regents 9.24% contribution is to be made to:

Company	Allocation* (Of Total Contribution)	
Fidelity	<input type="text"/>	%
TIAA	<input type="text"/>	%
Valic	<input type="text"/>	%

* The percentage listed for each company must be greater than or equal to 10% and must total 100%. Fractional percentages are not allowed.

Effective Date of the Change*: _____

* The effective date of the change must be one of the following dates: January 1, April 1, July 1, or October 1)

I certify that I have completed the necessary account application(s) and set up my account(s) with the ORP vendors I have chosen above.

Print Name

Social Security #

Signature

Date

TO BE COMPLETED BY HR:

Date Received by HR: _____

Verify Vendor Account Set-up: _____

Change Entered By: _____

Date Entered: _____

Revised 8.23.18