

**OPTIONAL RETIREMENT PROGRAM OF THE UNIVERSITY OF NORTH CAROLINA
ELECTION AND FORFEITURE AGREEMENT**

FORM ORP-1

SECTION A. EMPLOYEE DATA

FIRST NAME	MI	LAST NAME		
MAILING ADDRESS			DATE OF BIRTH (MM/DD/YYYY)	EMPLOYEE ID
CITY	STATE	ZIP CODE	PERSONAL EMAIL ADDRESS	TELEPHONE NUMBER
EMPLOYER (UNC SYSTEM INSTITUTION)			DATE OF ELIGIBLE EMPLOYMENT (MM/DD/YYYY):	

PREVIOUS UNC SYSTEM OR STATE OF NORTH CAROLINA EMPLOYMENT – LIST INSTITUTION NAME(S) AND DATES

SECTION B. RETIREMENT ELECTION

I hereby elect to participate in the UNC Optional Retirement Program (UNC ORP) in lieu of membership in the North Carolina Teacher’s and State Employees’ Retirement System (TSERS), as provided under G.S. 135-5.1. I understand that this election is irrevocable as long as I remain in an ORP-eligible position within the UNC System.

INVESTMENT CARRIER SELECTION (select one): FIDELITY TIAA

In electing the UNC ORP, under the provisions of G.S. 135-5.1(b)(5), I understand that should I leave employment with The University of North Carolina with less than a total of five years of retirement participation in the UNC ORP and/or prior participation in other State of North Carolina Retirement Programs (Teachers’ and State Employees’ Retirement System, Local Government Employees’ Retirement System, or the Consolidated Judicial System), the UNC ORP account(s) contributions, made on my behalf by The University, adjusted for investment experience of such contributions and for applicable charges, shall be forfeited pursuant to law unless I meet all of the following requirements below:

- My subsequent employer is a higher education or health care institution that sponsors a “like” retirement plan,
- The successor plan offers a retirement plan that is underwritten by one of the UNC ORP Carriers (i.e. Fidelity and/or TIAA), AND
- I begin employment within 12 months of my termination from The University of North Carolina and that I begin participation in my new employer’s retirement plan, which is my primary retirement plan. I further acknowledge that I understand I must start participating in my new employer’s plan within 60 days following the expiration of any enrollment waiting period (maximum waiting period up to 36 months). The University of North Carolina will verify with my subsequent employer my employment date and the date I enrolled in a “like” plan.

I understand that should I leave prior to vesting, the University portion in my account will be forfeited in accordance with the UNC ORP. My employee contributions may be retained in the insurance/mutual fund contract or withdrawn as permitted by such contract.

SECTION C. EMPLOYEE CERTIFICATION

My signature below certifies that I understand my UNC Optional Retirement Program election is irrevocable as long as I am employed by the University of North Carolina in an ORP-eligible position.

EMPLOYEE SIGNATURE	DATE
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Form ORP-1 (Rev. 4/23)

Contact Information for UNC System Institution Human Resources-Benefits Offices

Forward your completed ORP-1 form to your current institution. Use the contact list below to locate and communicate with your institution's human resources-benefits office and to submit your Optional Retirement Program (ORP) paperwork.

Institution HR-Benefits Mailing Address	Dept. Phone, Fax, and Email
Appalachian State University 330 University Hall Drive ASU PO Box 32010 Boone, NC 28608	O: (828) 262-3187 F: (828) 262-6489 human-resources@appstate.edu
East Carolina University 210 East 1 st Street Greenville, NC 27858	O: (252) 328-9847 F: (252) 328-9918
Elizabeth City State University 1704 Weeksville Road 220 Marion Thorpe Building Elizabeth City, NC 27909	O: (252) 335-3776 F: (252) 335-3415 hr@ecsu.edu
Fayetteville State University Attn: Human Resources 1200 Murchison Road Fayetteville, NC 28301	O: (910) 672-1146 F: (910) 672-1821
North Carolina Agricultural and Technical State University 1020 Wendover Avenue, Suite 109 Greensboro, NC 27405	O: (336) 334-7862 F: (336) 334-7316 hr@ncat.edu
North Carolina Arboretum 100 Frederick Law Olmstead Way Asheville, NC 28806	O: (828) 665-2492 F: (828) 412-8503 hr@ncarboretum.org
North Carolina Central University HR Benefits Services 1801 Fayetteville Street Durham, NC 27707	O: (919) 530-6334 F: (919) 530-7984 benefits@nccu.edu
North Carolina School of Science and Mathematics 1219 Broad Street Durham, NC 27715	O: (919) 416-2664 F: (877) 736-2103 hr@ncssm.edu
North Carolina State University 2711 Sullivan Drive Raleigh, NC 27695	O: (919) 515-2135 F: (919) 513-2528 hrrbenefits@ncsu.edu
UNC Faculty Physicians Hedrick Building 211 Friday Center Drive, Campus Box #7150 Chapel Hill, NC 27517	O: (919) 966-4385 F: (919) 966-0438 uncfpbenefits@unchealth.unc.edu
UNC Health 5221 Paramount Parkway, Suite 410 Morrisville, NC 27560	O: (984) 215-2800 F: (984) 974-1305 myhr@unchealth.unc.edu

Institution HR-Benefits Mailing Address	Dept. Phone, Fax, and Email
UNC Press 116 S. Boundary Street Chapel Hill, NC 27514	O: (919) 966-3561 F: (919) 962-2704
UNC System Office (incl. NCSEAA and PBS North Carolina) Attn: HR Benefits Services 223 S. West Street, Suite 1800 Raleigh, NC 27603	F: (984) 777-8990 orp@northcarolina.edu
University of North Carolina at Asheville 1 University Heights 228 Phillips Hall, CPO 1450 Asheville, NC 28804	O: (828) 251-6605 F: (828) 251-6385 benefits@unca.edu
University of North Carolina at Chapel Hill 104 Airport Drive, Campus Box 1045 Chapel Hill, NC 27599	O: (919) 962-3071 F: (919) 962-6010 benefits@unc.edu
University of North Carolina at Charlotte 9201 University City Boulevard Charlotte, NC 28223	O: (704) 687-8134 F: (704) 687-5254 benefits@uncc.edu
University of North Carolina at Greensboro Human Resources PO Box 26170 Greensboro, NC 27402	O: (336) 334-5009 F: (336) 334-5585 askbene@uncg.edu
University of North Carolina at Pembroke 1 University Drive PO Box 1510 Pembroke, NC 28372	O: (910) 775-4443 F: (910) 521-6553 benefits@uncp.edu
University of North Carolina School of the Arts Attn: Human Resources 1533 South Main Street Winston-Salem, NC 27127	O: (336) 770-1451 F: (336) 770-1462 benefits@uncsa.edu
University of North Carolina Wilmington 601 South College Road Wilmington, NC 28403	O: (910) 962-3160 F: (910) 962-3840 hrsearch@uncw.edu
Western Carolina University 302 H.F. Robinson 1 University Drive Cullowhee, NC 28723	O: (828) 227-7218 F: (828) 227-7195
Winston-Salem State University 601 S. Martin Luther King Jr. Drive Eller Hall Room 203 Winston-Salem, NC 27110	O: (336) 750-2830 F: (336) 750-2838 hrbenefits@wssu.edu