



Resources offered to help guide faculty through retirement plan selection process



STRS Ohio understands that picking a retirement plan is a very important decision. We offer the following resources to ensure your new faculty have the details needed to make an informed plan selection decision:

Retirement plan selection packet — Mailed to all new higher education faculty, this packet includes a *Retirement Plan Options* brochure, an *STRS Ohio Investment Options Guide* and a *Retirement Plan Selection Form for New Members*.

Retirement Plan Options presentation — Available at www.strsoh.org in the Videos Library, this presentation provides information about plan selection details and resources; the three STRS Ohio retirement plan options; the alternative retirement plan option and selecting investments.

Plan option information — The *During Your Career* section of the STRS Ohio website at www.strsoh.org includes a New Member area with retirement plan descriptions, details about choosing a plan, frequently asked questions and investment fund returns.

Retirement plan election and selection forms — New members can access both the *Retirement Plan Election Form* (completed to indicate ARP or STRS Ohio selection) as well as the *Retirement Plan Selection Form* (completed to indicate STRS Ohio retirement plan selection), in the Forms section of the STRS Ohio website. These fillable PDFs can be completed online and printed for submitting to the member's employer (election form) and STRS Ohio (selection form).

An STRS Ohio retirement plan selection can be made any of the following ways:

- **Online** via an Online Personal Account.
- **Mail** a *Retirement Plan Selection Form* to STRS Ohio (available in plan selection packet or online as indicated above).
- **Email** the selection form to contactus@strsoh.org.
- **Fax** the selection form to 614-233-8713.

STRS Ohio to provide benefits counseling in Cincinnati and Akron this July

For STRS Ohio members nearing retirement, the conclusion of the teaching year and start of summer is a good opportunity to meet with a benefits counselor to review member account and benefit information. STRS Ohio recommends this appointment three years before and again six to 12 months before retirement. Appointments are required and can be scheduled at www.strsoh.org via the Online Personal Account area or by calling 888-227-7877 (toll-free). Location details for STRS Ohio's July counseling opportunities are as follows:

July 8–11 Embassy Suites by Hilton
4554 Lake Forest Drive, Blue Ash, OH 45242

July 15–18 Holiday Inn
4073 Medina Road, Akron, OH 44333

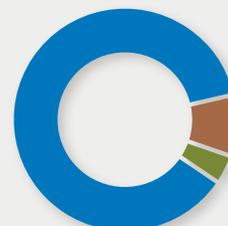
STRS Ohio also offers benefits counseling year-round at our Columbus offices and by teleconference.

Retirement Plan Selection Statistics

STRS Ohio 62%

Alternative Retirement Plan 38%

STRS Ohio Plan Selections



Defined Benefit Plan 81%

Defined Contribution Plan 14%

Combined Plan 5%

Contact us to schedule one of our retirement planning seminars on your campus

Planning for a secure retirement is a career-long process and STRS Ohio offers seminars targeted to every stage of a member's career. We offer the seminars below throughout the state as STRS Ohio-sponsored programs and also upon request as employer-sponsored programs.

To schedule an employer-sponsored program on your campus, please contact Member Education at MBGroupEducation@strsoh.org or 614-227-4082. Dates and locations for the STRS Ohio-sponsored seminars are available at www.strsoh.org in the During Your Career section. Members can register for those opportunities via an Online Personal Account or by calling STRS Ohio at 888-227-7877 (toll-free).



Financial Fitness: Your Pathway to Retirement

- **Defined Benefit and Combined Plan participants in early to mid-stages of their careers.**
- **Offers information on the following financial health topics:**
 - Money management and debt elimination strategies
 - The importance of supplementing the STRS Ohio pension with additional income
 - The fundamentals of investing



Beyond the Classroom

- **Defined Benefit Plan participants five to 10 years from retirement**
- **Focuses on retirement options and how to finance retirement, with information provided pertaining to:**
 - Eligibility requirements for the STRS Ohio pension benefit, how it is calculated and plan of payment options
 - Reconciling anticipated retirement expenses with pension income
 - Retirement health care considerations



Retirement Countdown

- **Defined Benefit Plan participants retiring in 12–18 months**
- **Guides members through key steps in the retirement process, including:**
 - A timeline with key steps leading up to retirement
 - The information required to complete the online *Service Retirement Application*
 - STRS Ohio Health Care Program enrollment