







Forms & Guides - Self-Managed Plan (SMP)

Specific information regarding the Self-Managed plan including the member guide, forms and brochures.

Document	Date	Pages	Download
<p>Self-Managed Plan Member Guide</p> <p>The SURS Self-Managed plan (SMP) is a defined contribution plan that establishes an account into which your contributions and the employer (State of Illinois) contributions are placed.</p>	02/20	24	 [1]
<p>Self-Managed Plan Getting Started Guide</p> <p>Use this guide to help you select your SURS Self-Managed Plan service provider(s) and investment options.</p>	05/16	16	 [2]
<p>Self-Managed Plan Investment Options Guide</p> <p>Refer to this Investment Options Guide for a description of each fund available in the SMP.</p>	05/16	40	 [3]
<p>Third Restatement of the Self-Managed Plan</p> <p>The Board of Trustees of the State Universities Retirement System hereby restates the Self-Managed Plan established on April 1, 1998, in this Plan Document (hereinafter, "the Third Restatement") effective as of June 1, 2020. As part of this Third Restatement, the Plan is being renamed the "State Universities Retirement System Retirement Savings Plan.</p>	06/20	28	 [4]
<p>Self-Managed Plan Retirement Application</p> <p>This Retirement Application Builder is used to gather the necessary forms needed to apply for your retirement benefits.</p>	05/15	60	 [5]

<p>SMP Service Credit Brochure</p> <p>Learn how SMP members can purchase more service credit using payroll deductions.</p>	09/13	2	 [6]
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Additional Resources

Change of Address Form [7]

Save a stamp by changing your address online through the Member website [8].

FAQs [9]

Answers to member questions on a wide array of topics from disability to separation refunds.

QILDRO Information [10]

If your retirement benefits are being considered for possible division in divorce proceedings, the following information will be helpful.

Service Credit, Refunds and Retirement Information [11]

These brochures and leaflets explain the purchase of prior service, the Reciprocal Act and systems, the refund process, and retirement annuities.

Tax Forms [12]

SURS Special Tax Notice and links to IRS [13] W4-P, W8-BEN, and W-9 forms.

Tags:

Forms [14]

Self-Managed Plan [15]

Retirement Plans [16]

Source URL: <http://surs.com/forms-guides-self-managed-plan-smp>

Links

[1] <http://surs.com/sites/default/files/pdfsx/Guide-SMP.pdf>

[2] <http://surs.com/sites/default/files/pdfsx/gettingstartedguide.pdf>

[3] <http://surs.com/sites/default/files/pdfsx/smpinvestmentoptionsguide.pdf>

[4] <http://surs.com/sites/default/files/pdfsx/SURS%20Retirement%20Savings%20Plan%20Document.pdf>

[5] <http://surs.com/self-managed-plan-retirement-application-builder%20>

[6] <http://surs.com/sites/default/files/pdfsx/ServCred.pdf>

[7] <http://surs.com/sites/default/files/pdfsx/ChangeAddr-001INT.pdf>

[8] <https://webserver.surs.org/CGI->

BIN/lansaweb?wam=WSLOGON&webrtn=wrlogon&ml=LANSA:XHTML&part=PRD&lang=ENG

[9] <http://surs.com/self-managed-plan-faqs>

[10] <http://surs.com/divorce-and-qildros>

[11] <http://surs.com/fact-sheets>

[12] <http://surs.com/tax-forms>

[13] <http://www.irs.gov>

[14] <http://surs.com/tags/forms>

[15] <http://surs.com/tags/self-managed-plan>

[16] <http://surs.com/tags/retirement-plans>