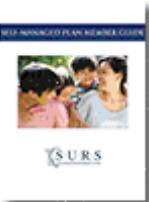


Forms & Guides - Self-Managed Plan (SMP)

Self-Managed Plan Resources

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

Document	Date	Pages
 <p>[1] Self-Managed Plan [2]</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>	12/14	28
 <p>[3] Self-Managed Plan Getting Started Guide [4]</p> <p>Use this guide to help you select your SURS Self-Managed Plan service provider(s) and investment options.</p>	05/16	12
 <p>[5] Self-Managed Plan Investment Options Guide [6]</p> <p>Refer to this Investment Options Guide for a description of each fund available in the SMP.</p>	05/16	24
 <p>[7] Second Restatement of the Self-Managed Plan [8]</p> <p>The Board of Trustees of the State Universities Retirement System restates the Self-Managed Plan effective as of January 1, 2014.</p>	01/14	34

 <p>[9] Self-Managed Plan Retirement Application [10]</p> <p>This booklet addresses the questions most frequently asked of SURS staff. Some of the provisions discussed may not apply, depending of the date your annuity began.</p> <hr/> <p>Retirement Preparation and Application Completion Video [11] A helpful video for those individuals planning to retire in the next 90 days.</p>	5/15	60
 <p>[12] SMP Service Credit Brochure [13]</p> <p>Learn how SMP members can purchase more service credit using payroll deductions.</p>	9/13	2

Additional Resources

[Change of Address Form](#) [17]

Save a stamp by changing your address online through the [Member website](#) [18].

[FAQs](#) [19]

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

[QILDRO Information](#) [20]

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](#) [21]

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

[Tax Forms](#) [22]

SURS Special Tax Notice and links to [IRS](#) [23] W4-P, W8-BEN, and W-9 forms.

Tags:

[Forms](#) [24]

[Self-Managed Plan](#) [25]

Source URL: <https://surs.org/forms-guides-self-managed-plan-smp>

Links

- [1] https://surs.org/pdfs/mem_guide/Guide-SMP.pdf
- [2] <https://surs.org/sites/default/files/pdfsx/Guide-SMP.pdf>
- [3] <https://surs.org/pdfs/SMP/gettingstartedguide.pdf>
- [4] <https://surs.org/sites/default/files/pdfsx/gettingstartedguide.pdf>
- [5] <https://surs.org/pdfs/SMP/smpinvestmentoptionsguide.pdf>
- [6] <https://surs.org/sites/default/files/pdfsx/smpinvestmentoptionsguide.pdf>
- [7] <https://surs.org/pdfs/SMP/ReSMP.pdf>
- [8] <https://surs.org/sites/default/files/pdfsx/ReSMP.pdf>
- [9] <https://surs.org/pdfs/forms/RetAppSMP.pdf>
- [10] <https://surs.org/self-managed-plan-retirement-application-builder%20>
- [11] <https://surs.org/video/smpretireapp2/smpretireappcap2.html>
- [12] <https://surs.org/pdfs/SMP/ServCred.pdf>
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- [17] <https://surs.org/sites/default/files/pdfsx/ChangeAddr-001INT.pdf>
- [18] <https://webserver.surs.org/CGI-BIN/lansaweb?wam=WSLOGON&webtrn=wrlogon&ml=LANSA:XHTML&part=PRD&lang=ENG>
- [19] <https://surs.org/self-managed-plan-faqs>
- [20] <https://surs.org/divorce-and-qildros>
- [21] <https://surs.org/fact-sheets>
- [22] <https://surs.org/tax-forms>
- [23] <http://www.irs.gov>
- [24] <https://surs.org/tags/forms>
- [25] <https://surs.org/tags/self-managed-plan>
- [26] <https://surs.org/tags/retirement-plans>