

Contacts

FRS Employer Assistance Line

1-866-377-2121, Option 3 (Investment Plan Administrator)
9:00 a.m. to 8:00 p.m. ET, Monday through Friday (except holidays)

MyFRS Financial Guidance Line for Employees

1-866-446-9377, Option 2 (TRS 711)
9:00 a.m. to 8:00 p.m. ET, Monday through Friday (except holidays)

EY financial planners provide free, unbiased guidance.

Investment Plan Administrator

1-866-377-2121, Option 3 (FRS Employer Assistance Line)
9:00 a.m. to 8:00 p.m. ET, Monday through Friday (except holidays)

General Deliveries:

FRS Investment Plan Administrator
P.O. Box 785027
Orlando, FL 32878-5027

Overnight Deliveries:

FRS Investment Plan Administrator
2300 Discovery Dr.
Orlando, FL 32826-3712

For the FRS Investment Plan, the Investment Plan Administrator plays two roles: administrator and recordkeeper.

The Investment Plan Administrator handles the day-to-day administration of the Investment Plan. They ensure that the Plan works the way it's supposed to and that it follows the rules. Specifically, this includes receiving and processing a member's initial plan choice and any 2nd Elections, verifying Investment Plan members' employment status, and performing [Section 415 contribution limit](#) monitoring.

The Plan Administrator is the Investment Plan's bookkeeper. They keep track of who participates in the Plan, what investments members own, and what money moves in and out of the Plan. Specifically, this includes maintaining members' Investment Plan accounts, making payouts to members, and preparing and mailing quarterly plan statements to members.

How the Investment Plan Administrator Can Help You

You can call the FRS Employer Assistance Line at 1-866-377-2121, Option 3, and speak with a representative to get help with these issues:

- Ordering MyFRS Financial Guidance Program printed materials
- Choosing an FRS retirement plan
- Investment Plan administration issues
- Quarterly FRS Investment Plan account statements

- Demographic changes for inactive Investment Plan members (active member demographic information must be changed via your monthly payroll file)
- Submitting a member's termination date
- Employee payout dates
- Forms (ACH, Enrollment, Beneficiary Designation, Termination, Rollover, Death Claim)
- Special Tax Notice
- Qualified Domestic Relations Orders (QDROs)
- Required minimum distributions (RMDs)
- The Self-Directed Brokerage Account (SDBA)

State Board of Administration of Florida

850-488-4406 (local)

9:00 a.m. to 5:00 p.m. ET, Monday through Friday (except holidays)

DefinedContributionPrograms@sbafla.com

General Deliveries:

State Board of Administration of Florida

P.O. Box 13300

Tallahassee, FL 32317-3300

Overnight Deliveries:

State Board of Administration of Florida

1801 Hermitage Blvd., Suite 100

Tallahassee, FL 32308-7743

The State Board of Administration of Florida (SBA) is a constitutional entity of Florida state government that manages over 30 investment mandates, comprising over \$194 billion in assets under management. The SBA is the Investment Plan Sponsor and is committed to providing superior investment and trust services and educational resources while adhering to the highest ethical, fiduciary, and professional standards.

Division of Retirement (the Division)

1-866-377-2121, Option 2 (FRS Employer Assistance Line) | 850-907-6500 (local) | 1-844-377-1888

8:00 a.m. to 5:00 p.m. ET, Monday through Friday (except holidays)

retirement@dms.myflorida.com

General Deliveries:

Division of Retirement

P.O. Box 9000

Tallahassee, FL 32315-9000

Overnight Deliveries:

Division of Retirement

1317 Winewood Blvd., Building 8

Tallahassee, FL 32399-1560

The Division of Retirement is the FRS Pension Plan Sponsor and Administrator. The Division can answer all questions from employers and active and retired members relating to the Pension Plan, the DROP (Deferred Retirement Option Program), and the Health Insurance Subsidy (HIS).

How the Division Can Help You

You can call the FRS Employer Assistance Line at 1-866-377-2121, Option 2, and speak with a Division representative to get help with the following issues.

For Investment Plan and Pension Plan:

- Monthly payroll/contribution reporting
- File transfer procedure and the funds transfer system
- Timing of contributions to both plans
- Employee data files
- Membership classes
- Disability benefits
- Health Insurance Subsidy (HIS)

For Pension Plan only:

- Pension Plan provisions
- Deferred Retirement Option Program (DROP)
- Pension Plan Qualified Domestic Relations Orders (QDROs)

EY

1-866-377-2121, Option 1 (FRS Employer Assistance Line)
9:00 a.m. – 8:00 p.m. ET, Monday – Friday (except holidays)

EY provides Investment Plan and Pension Plan members with financial planning services. These services are provided to FRS members free of charge, courtesy of the FRS. EY financial planners are experienced, unbiased, and credentialed. They are available through the MyFRS Financial Guidance Line and in person at the financial and retirement planning workshops they conduct. EY financial planners do not sell any investment or insurance products. They are there to serve as your employees' personal retirement and financial advocates. They will answer any retirement and financial questions you or your employees may have.

How EY Can Help You

You can call the FRS Employer Assistance Line at 1-866-377-2121, Option 1, and speak with an EY representative to get help with these issues:

- Retirement plan choice
- Financial planning
- The one-time 2nd Election and 2nd Election Choice Service
- The Advisor Service
- FRS Investment Plan and distribution options
- Scheduling EY-led employee workshops
- Reemployment restrictions
- DROP payout/Investment Plan rollover options
- [Survivor financial counseling](#) for Investment Plan and Pension Plan beneficiaries