

Self-Managed Plan

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. You decide how your account balance will be invested, selecting from a variety of mutual funds and variable annuities.

Navigating the Self-Managed Plan [1]

This information is for Self-Managed Plan (SMP) participants who are new to the SURS System or just want information regarding SMP procedures including transfers, service credit purchases and accumulation, and contact information.

Asset Allocation [2]

Investment studies have shown that asset allocation is the most important factor influencing the return on your portfolio. This information will explain the difference between asset classes and provide you with some portfolio examples.

Forms and Guides [3]

Resources for SMP members including the Member Guide and retirement application, as well as information regarding service credit, insurance, and tax forms.

Frequently Asked Questions [4]

Get answers to frequently asked questions regarding retirement, insurance, disability, refunds, and more.

Fund Overview [5]

A brief review of the investment approach and an assessment of each investment option offered in the Self-Managed Plan.

Helpful Sites [6]

Use these links to find the latest tax forms available, contact your SMP Provider, learn about the State Universities Annuitant Association, and much more.

Member Guide [7]

Learn more specific information about the benefits of the Self-Managed plan.

Two-Tier Retirement System Chart [8]

Compare the differences between the Portable, Traditional, and Self-Managed Plans.

Quarterly Performance [9]

The most recent SMP Quarterly Returns and previous performance reports are available to provide members with historical fund analyses. Also provides information on benchmarks and their interpretation.

Retirement Application [10]

Use this form to apply for retirement benefits of the Self-Managed plan.

Self-Managed Plan Retirement Planning Fact Sheet [11]

A retirement readiness checklist.

Self-Managed Plan Seminars/Webinars [12]

Visit our Seminars and Webinars page to register for our available events.

Service Providers [13]

Service Providers maintain member fund allocations, invest funds, send detailed quarterly statements, and forward summary statement information to SURS. Learn who to contact if you need to change your allocations or coordinate a withdrawal.

Videos [14]

SURS [Videos](#) [14] to help guide you through various topics such as logging on and navigating the Member Website, the Benefit Estimator, information regarding the Traditional Plan, and more!

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Links

[1] <https://www.surs.org/sites/default/files/pdfsx/NavigatingSMP.pdf>

[2] <https://www.surs.org/asset-allocation>

[3] <https://www.surs.org/forms-guides-self-managed-plan-smp>

[4] <https://www.surs.org/self-managed-plan-faqs>

[5] <https://www.surs.org/fund-overview>

[6] <https://www.surs.org/helpful-sites>

[7] <https://www.surs.org/sites/default/files/pdfsx/Guide-SMP.pdf>

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