

**Deferred Compensation Program
Brown Bag Training Classes
2017**

Course Name	Date	Start	End	Location	Instructor	Attendance
Retirement Planning for Women	01/10/2017	12:00 PM	1:00 PM	Airport Administration - 1701 Airport Blvd., Lockheed Conference Room		
Retirement Planning for Women	01/12/2017	12:00PM	1:00PM	San Jose Muni Water - 3025 Tuers Rd., Admin. Room		
Retirement Planning for Women	01/17/2017	12:00PM	1:00PM	Central Service Yard - 1661 Senter Rd. - Building A, 1st Floor Ready Room		
Retirement Planning for Women	01/19/2017	12:00PM	1:00PM	City Hall, Room T-550		
457 Deferred Compensation-Catch-Up Provisions-Age 50/3 Year Special	02/14/2017	12:00PM	1:00PM	San Jose / Santa Clara Regional Wastewater Facility - 700 Los Esteros Rd., Admin. Building, Conference Room B		
457 Deferred Compensation-Catch-Up Provisions-Age 50/3 Year Special	02/16/2017	12:00PM	1:00PM	Mabury Yard (DOT) - 1404 Mabury Road, South Conference Room		
457 Deferred Compensation-Catch-Up Provisions-Age 50/3 Year Special	02/21/2017	12:00PM	1:00PM	City Hall, Room T-550		
457 Deferred Compensation-Catch-Up Provisions-Age 50/3 Year Special		12:00PM	1:00PM	Evergreen Library - 2635 Aborn Road, Community Room		
San Jose Deferred Compensation Plan - Deferred Compensation 101	03/07/2017	12:00 PM	1:00PM	Central Service Yard - 1661 Senter Rd. - Building A, 1st Floor Ready Room		
San Jose Deferred Compensation Plan - Deferred Compensation 101	03/16/2017	12:00PM	1:00PM	City Hall, Room T-550		
San Jose Deferred Compensation Plan - Deferred Compensation 101	03/21/2017	12:00PM	1:00PM	Police Administration Office (PAB) - 201 West Mission St., Conference Room 314		
SJDCP Website - Account Access, Tools, Calculators and Mobile App	04/04/2017	12:00PM	1:00PM	Animal Care Center - 2750 Monterey Rd., Classroom		
SJDCP Website - Account Access, Tools, Calculators and Mobile App	04/11/2017	12:00PM	1:00PM	San Jose / Santa Clara Regional Wastewater Facility - 700 Los Esteros Rd., Admin. Building, Conference Room B		
SJDCP Website - Account Access, Tools, Calculators and Mobile App	04/13/2017	12:00PM	1:00PM	Mabury Yard (DOT) - 1404 Mabury Road, South Conference Room		
SJDCP Website - Account Access, Tools, Calculators and Mobile App	04/20/2017	12:00PM	1:00PM	City Hall, Room T-550		
Distribution Options - When and How	05/02/2017	12:00PM	1:00PM	Retirement Services - 1737 North 1st Street, 6th Floor - Downtown Conference Room		
Distribution Options - When and How	05/09/2017	12:00PM	1:00PM	Central Service Yard - 1661 Senter Rd. - Building A, 1st Floor Ready Room		
Distribution Options - When and How	05/11/2017	12:00PM	1:00PM	Airport Administration - 1701 Airport Blvd., Lockheed Conference Room		
Distribution Options - When and How	05/18/2017	12:00PM	1:00PM	City Hall, Room T-550		
Distribution Options - When and How	TBD	12:00PM	1:00PM	Evergreen Library - 2635 Aborn Road, Community Room		
Charting Your Own Course - SJDCP Investment Options	06/06/2017	12:00PM	1:00PM	San Jose / Santa Clara Regional Wastewater Facility - 700 Los Esteros Rd. - Admin. Building, Conference Room B		
Charting Your Own Course - SJDCP Investment Options	06/13/2017	12:00PM	1:00PM	City Hall, Room T-550		

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Charting Your Own Course - SJDCP Investment Options	06/15/2017	12:00PM	1:00PM	Police Administration Office (PAB) - 201 West Mission St., Conference Room 314		
The Sandwich Generation	07/06/2017	12:00PM	1:00PM	San Jose Muni Water - 3025 Tuers Rd, Admin. Room		
The Sandwich Generation	07/11/2017	12:00PM	1:00PM	Central Service Yard - 1661 Senter Rd. - Building A, 1st Floor Ready Room		
The Sandwich Generation	07/20/2017	12:00PM	1:00PM	City Hall, Room T-550		
San Jose Deferred Compensation Plan - Deferred Compensation 101	08/08/2017	12:00PM	1:00PM	Animal Care Center - 2750 Monterey Rd., Classroom		
San Jose Deferred Compensation Plan - Deferred Compensation 101	08/15/2017	12:00PM	1:00PM	Airport Administration - 1701 Airport Blvd., Lockheed Conference Room		
San Jose Deferred Compensation Plan - Deferred Compensation 101		12:00PM	1:00PM	City Hall, Room T-550		
San Jose Deferred Compensation Plan - Deferred Compensation 101	08/22/2017	12:00PM	1:00PM	San Jose / Santa Clara Regional Wastewater Facility - 700 Los Esteros Rd. - Admin. Building, Conference Room B		
San Jose Deferred Compensation Plan - Deferred Compensation 101	TBD	12:00PM	1:00PM	Evergreen Library - 2635 Aborn Road, Community Room		
Retirement Choices	09/12/2017	12:00PM	1:00PM	Central Service Yard - 1661 Senter Rd. - Building A, 1st Floor Ready Room		
Retirement Choices	09/14/2017	12:00PM	1:00PM	Mabury Yard (DOT) - 1404 Mabury Road, South Conference Room		
Retirement Choices	09/21/2017	12:00PM	1:00PM	City Hall, Room T-550		
457 Deferred Compensation-Catch-Up Provisions-Age 50/3 Year Special	10/03/2017	12:00PM	1:00PM	San Jose / Santa Clara Regional Wastewater Facility - 700 Los Esteros Rd. - Admin. Building, Conference Room B		
457 Deferred Compensation-Catch-Up Provisions-Age 50/3 Year Special	10/10/2017	12:00PM	1:00PM	Retirement Services - 1737 North 1st Street, 6th Floor - Downtown Conference Room		
457 Deferred Compensation-Catch-Up Provisions-Age 50/3 Year Special	10/12/2017	12:00PM	1:00PM	Police Administration Office (PAB) - 201 West Mission St., Conference Room 314		
457 Deferred Compensation-Catch-Up Provisions-Age 50/3 Year Special	10/19/2017	12:00PM	1:00PM	City Hall, Room T-550		
Budgeting	11/09/2017	12:00PM	1:00PM	Central Service Yard - 1661 Senter Rd. - Building A, 1st Floor Ready Room		
Budgeting	11/21/2017	12:00PM	1:00PM	Airport Administration - 1701 Airport Blvd., Lockheed Conference Room		
Budgeting	11/23/2017	12:00PM	1:00PM	City Hall, Room T-550		
Distribution Options - When and How	12/05/2017	12:00PM	1:00PM	San Jose / Santa Clara Regional Wastewater Facility - 700 Los Esteros Rd. - Admin. Building, Conference Room B		
Distribution Options - When and How	12/12/2017	12:00PM	1:00PM	Mabury Yard (DOT) - 1404 Mabury Road, South Conference Room		
Distribution Options - When and How	12/14/2017	12:00PM	1:00PM	City Hall, Room T-550		
Distribution Options - When and How		12:00PM	1:00PM			

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CLASS DESCRIPTION

Retirement Planning for Women

While the gap in earnings between men and women is shrinking, years of disparity has put women behind in terms of retirement savings. Other factors, such as longer life expectancy and less time in the workforce, have also put women in a position to play catch-up. By understanding your retirement needs, saving more, and developing a sound plan, you can take control of your financial future.

457 Deferred Compensation-Catch-Up Provisions-Age 50 / 3 Year Special

Deferred Compensation offers 2 "catch-up" provisions allowing increased contributions as retirement approaches: the Age 50 and the 3-Year Special Catch-Up. This seminar will explain each and help you decide when it is appropriate to use them. Topics will include the timing and amount of eligibility, and unused vacation/sick leave payouts.

San Jose Deferred Compensation Plan - Deferred Compensation 101

How the City of San Jose Deferred Compensation Plan works. The basic concepts, rules, and regulations of 457 Governmental DC plans. The benefits of pre-tax and post-tax contributions, and tax-deferred growth.

SJDCP Website - Account Access, Tools, Calculators and the Mobile App.

Learn how to navigate some of the most useful tools on the SJDCP Website including My Retirement Outlook, which illustrates your complete retirement income picture including the San Jose Pension Plan already programmed into the system. You'll also be given a tour and hands on instructions on how to use Voya's new Mobile App; bring your Smart Phone!

Deferred Compensation Distribution Options -When and How

Discussion of when and how the money in your 457 Deferred Compensation Plan is available for distribution and considerations for making the right choices.

Charting your own Course

Gain a thorough understanding of all the plan's investment options to effectively manage your portfolio. Topics include: understanding the stock market, types of mutual funds, understanding risk vs. reward, market capitalization, asset allocation funds, diversification, and personal investing principles.

The Sandwich Generation

Learn how to plan for your children's college education, your own retirement, and your parents' aging care needs all at the same time.

Retirement Choices

Come join us for a pre-retirement discussion of things to consider for your City of San Jose Deferred Compensation, especially if you are within 3-5 years of retirement.

Budgeting

Creating or reworking a budget could seem like a challenge to some; however, it could be as easy as 1-2-3! We will take a look at what you are saving for, and where your money typically goes. We'll walk through a simple budget plan, and even make room for extra items such as gifts and vacations, and an emergency fund.

Alternatives to Retirement

This session assists Federated, Police, and Fire members (all tiers) in understanding opportunities that may exist if separating from City employment prior to retirement (Reciprocity, Deferred Vested Retirement, or Return of Contributions). In addition, Voya will make a presentation on Deferred Compensation.