



Deferred Compensation Program

2018 Brown Bag Seminars



Please join your dedicated Voya representative for monthly seminars covering various topics throughout the year to help you understand and prepare for your retirement.

January: Understanding VEBA Investment Options

Learn what investment funds are available within your VEBA account, strategies for saving, and how to update your allocations.

February: Understanding VEBA Investment Options

Learn what investment funds are available within your VEBA account, strategies for saving, and how to update your allocations.

March: Understanding VEBA Investment Options

Learn what investment funds are available within your VEBA account, strategies for saving, and how to update your allocations.

April: Understanding VEBA Investment Options

Learn what investment funds are available within your VEBA account, strategies for saving, and how to update your allocations.

May: Understanding VEBA Investment Options

Learn what investment funds are available within your VEBA account, strategies for saving, and how to update your allocations.

June: Charting Your Own Course - Investment Options

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

Date/ Time 12PM - 1PM	Location
Thursday, January 18th	Mabury Yard (DOT) 1404 Mabury Road, South Conference Room
Tuesday, January 30th	San Jose / Santa Clara Regional Wastewater Facility 700 Los Esteros Rd., Admin Building, Conference Room B
Thursday, February 8th	San Jose Municipal Water 3025 Tuers Rd. Admin. Room
Tuesday, February 13th	Police Administration Office (PAB) 201 West Mission St., Conference Room 314
Thursday, February 15th	Animal Care Center 2750 Monterey Road, ACS Classroom
Thursday, February 22nd	City Hall Room T-550
Thursday, March 8th	Central Service Yard 1661 Senter Rd. Building A, 1st Floor Ready Room
Tuesday, March 13th	City Hall Room T-550
Thursday, March 22nd	Airport Administration 1701 Airport Blvd., Lockheed Conference Room
Tuesday, March 27th	Retirement Services 1737 North 1st Street 6th Floor - Downtown Conference Room
Thursday, April 19th	City Hall Room T-550
Tuesday, April 24th	Mabury Yard (DOT) 1404 Mabury Road, North Conference Room
Monday, April 30th	San Jose / Santa Clara Regional Wastewater Facility 700 Los Esteros Rd., Admin Building, Conference Room B
Tuesday, May 1st	Animal Care Center 2750 Monterey Road, ACS Classroom
Thursday, May 10th	Central Service Yard 1661 Senter Rd. Building A, 1st Floor Ready Room
Tuesday, May 15th	Airport Administration 1701 Airport Blvd., Lockheed Conference Room
Thursday, May 24th	City Hall Room T-550
Thursday, June 7th	San Jose / Santa Clara Regional Wastewater Facility 700 Los Esteros Rd., Admin Building Conference Process Engineering
Tuesday, June 12th	City Hall Room T-550
Thursday, June 21st	Police Administration Office (PAB) 201 West Mission St., Conference Room 314

Employees should obtain supervisor approval if attendance is outside normal lunch break.

Approved for posting by the Acting Director of Human Resources



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July: 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.

August: Deferred Compensation 101

Learn 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.

September: 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.

October: 457 Deferred Compensation Catch-up Provisions

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, eligibility, and unused vacation/sick leave payouts.

November: 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.

December: Distribution Options - When & 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.

Date/ Time 12PM - 1PM	Location
Thursday, July 12th	San Jose Municipal Water 3025 Tuers Rd. Admin. Room
Tuesday, July 17th	Central Service Yard 1661 Senter Rd. Building A, 1st Floor Ready Room
Thursday, July 26th	City Hall Room T-550
Tuesday, August 7th	Animal Care Center 2750 Monterey Rd., ACS Classroom
Thursday, August 16th	Mabury Yard (DOT) 1404 Mabury Road, South Conference Room
Thursday, August 23rd	City Hall Room T-550
Tuesday, September 4th	Central Service Yard 1661 Senter Rd. Building A, 1st Floor Ready Room
Tuesday, September 11th	San Jose Municipal Water 3025 Tuers Rd. Admin. Room
Thursday, September 20th	Police Administration Office (PAB) 201 West Mission St., Conference Room 314
Tuesday, September 25th	City Hall, Room T-550
Thursday, October 4th	San Jose / Santa Clara Regional Wastewater Facility 700 Los Esteros Rd., Admin Building, Conference Process Engineering
Tuesday, October 9th	Retirement Services 1737 North 1st Street 6th Floor - Downtown Conference Room
Thursday, October 18th	Airport Administration 1701 Airport Blvd., Lockheed Conference Room
Tuesday, October 23rd	City Hall Room T-550
Tuesday, November 6th	Animal Care Center 2750 Monterey Rd., ACS Classroom
Thursday, November 15th	Mabury Yard (DOT) 1404 Mabury Road, South Conference Room
Tuesday, November 20th	City Hall Room T-550
Thursday, December 6th	San Jose / Santa Clara Regional Wastewater Facility 700 Los Esteros Rd., Admin Building, Conference Room B
Thursday, December 13th	Police Administration Office (PAB) 201 West Mission St., Conference Room 314
Tuesday, December 18th	City Hall Room T-550
Tuesday December 18th	Central Service Yard 1661 Senter Rd. Building A, 1st Floor Ready Room

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