





RETIREMENT BOARD CALENDAR SHEET
Deferred Compensation Committee Meeting of June 21, 2017

To: Deferred Compensation Committee

Through: Jay Huish 
Executive Director

From: Diane Chui Justen 
Deferred Compensation Plan Manager

Date: June 21, 2017

Agenda Item

SFDCP Manager Report

Background

Diane Chui Justen, Deferred Compensation Plan Manager, will report on the following items currently worked on by Staff:

- Stable Value
- Loans
- Participation
- Education and outreach

Recommendation

This is a discussion only item.

Attachments

Investing Seminar Overview and Results



City and County of
San Francisco

Deferred Compensation Plan

SFDCP SEMINARS

JUNE 13, 2017

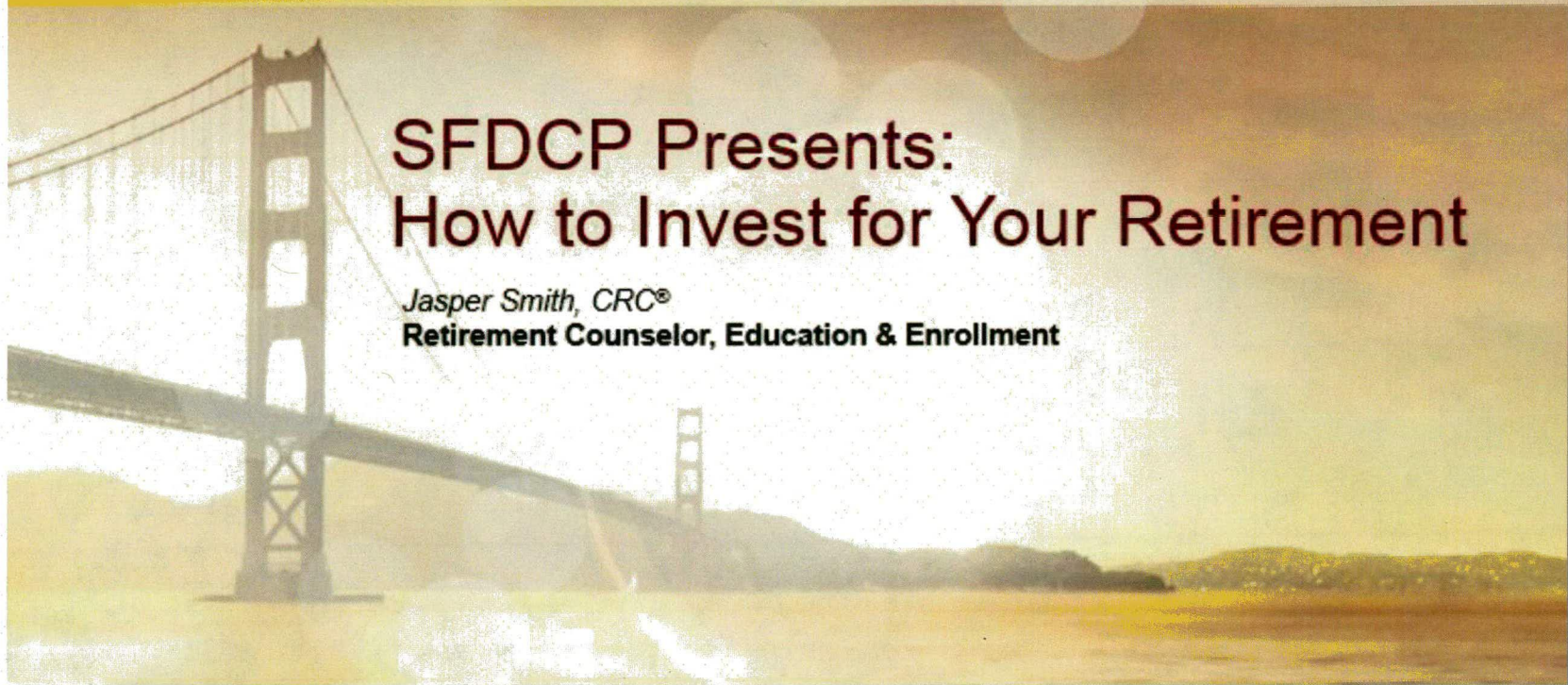


City and County of
San Francisco

Deferred Compensation Plan

SFDCP Presents: How to Invest for Your Retirement

Jasper Smith, CRC®
Retirement Counselor, Education & Enrollment





City and County of
San Francisco

Deferred Compensation Plan

SUMMARY OF RESULTS

12:00 pm Session:

82 attendees

69 registered, 13 walk-ins

1:00 pm Session

87 attendees

53 registered, 34 walk-ins

Total attendance: 169

Surveys collected: 104

Take action forms collected: 16 (Note: additional action was taken by attendees on mobile phones at the seminars)

Requests for counselor to follow-up: 45

Over 35% attendees either took action or requested follow-up with the counseling team. That is 61 attendees taking or requesting action for the two sessions held.



City and County of
San Francisco
Deferred Compensation Plan

POSTER

SFDCP PRESENTS:
How to Invest for Your Retirement

Invest an hour for your future
FREE seminar for CCSF Employees featuring benefits information...and giveaways!

Bring your lunch to this Brown Bag event sponsored by the San Francisco Deferred Compensation Plan (SFDCP).

Light refreshments will be served!

When: Tuesday, June 13, 2017, Noon or 1 p.m.
Where: San Francisco Public Library—Main Library
100 Larkin St.

Latino/Hispanic Community Room
RSVP*: 415-487-7500 or email: team.sfdcp@sfgov.org

*When sending your RSVP, provide your name, which session you'll attend and the name of a coworker you'll be bringing (if any).

Earn a giveaway when you attend**

Choose from a:

- Canvas-style tote
- Stainless steel tumbler/travel mug
- Notebook/pen set

**While supplies last.

To qualify, do one of the following:

- Enroll or increase your contributions to your SFDCP account
- Bring a coworker to the event
- Add the SFDCP website icon to your smartphone
- Make an appointment with a Retirement Counselor
- Complete an event survey

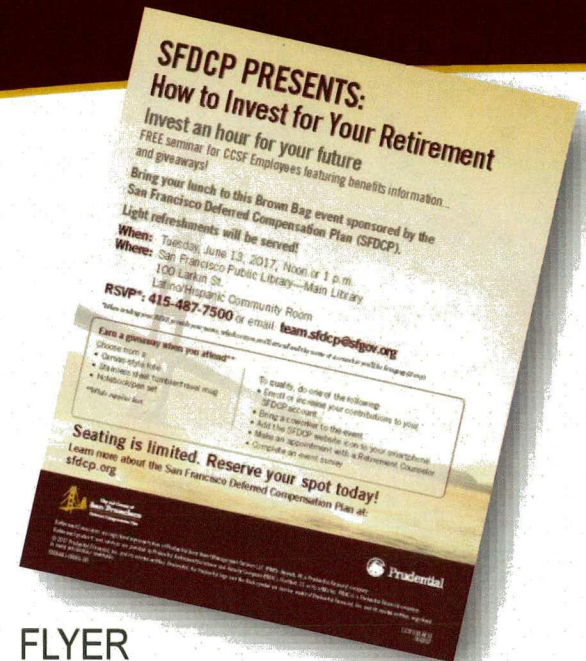
Seating is limited. Reserve your spot today!

Learn more about the San Francisco Deferred Compensation Plan at: sfdcp.org



Prudential Retirement Corporation and registered representatives of Prudential Investment Management Services (PIM) (PIM): Road & 101 PIM is a Prudential Financial member. Retirement products and services are provided by Prudential Investment Services and Financial Group (PISFG), Prudential CI or its affiliates. PIM is a Prudential Financial company. © 2017 Prudential Insurance Co. and its associated entities. Prudential, the Prudential logo and the Rock symbol are service marks of Prudential Insurance Co. and its related entities, registered in some jurisdictions worldwide. (03/14) 10001-00

PROMOTIONAL MATERIALS



FLYER

TABLE TENT

<p>Invest in you!</p> <p>SFDCP PRESENTS: How to Invest for Your Retirement</p> <p>Tuesday, June 13, 2017 at 12 p.m. OR 1 p.m. at the San Francisco Public Library—Main Library, Latino/Hispanic Community Room.</p> <p>Bring your lunch to this Brown Bag event and enjoy some light refreshments hosted by the San Francisco Deferred Compensation Plan (SFDCP).</p> <p>Two sessions are being offered to accommodate lunch schedules.</p> <p>Seating is limited, so RSVP by calling 415-487-7500 or email: team.sfdcp@sfgov.org</p> <p>Please provide:</p> <ul style="list-style-type: none"> • Your name • Which session you will attend • The name of the coworker you're attending with, if any 	<p>Giveaways!</p> <p>Choose from a*:</p> <ul style="list-style-type: none"> • Canvas-style tote • Stainless steel tumbler/travel mug • Notebook/pen set <p>To qualify, do one of the following:</p> <ul style="list-style-type: none"> • Enroll or increase your contributions to your SFDCP account • Bring a coworker to the event • Add the SFDCP website icon to your smartphone • Make an appointment with a Retirement Counselor • Complete an event survey <p><small>*While supplies last</small></p>	<p>See you there!</p> <p>Free Seminar for CCSF Employees on June 13, 2017</p> <p><small>Sponsored by the City and County of San Francisco Deferred Compensation Plan</small></p> <p>Did you know that you could actually be saving more for retirement?</p> <p><small>Qualified City and County of San Francisco employees can make additional payroll deductions through the San Francisco Deferred Compensation Plan (SFDCP). The SFDCP is an employee benefit offered by the Retirement System (RRS), allowing you to accumulate deferred retirement savings through voluntary contributions designed to supplement your pension benefits.</small></p> <p>Learn more about the San Francisco Deferred Compensation Plan at: sfdcp.org</p> <p> </p> <p><small>Prudential Retirement Corporation and registered representatives of Prudential Investment Management Services (PIM) (PIM): Road & 101 PIM is a Prudential Financial company. Retirement products and services are provided by Prudential Investment Services and Financial Group (PISFG), Prudential CI or its affiliates. PIM is a Prudential Financial company. © 2017 Prudential Insurance Co. and its associated entities. Prudential, the Prudential logo and the Rock symbol are service marks of Prudential Insurance Co. and its related entities, registered in some jurisdictions worldwide. (03/14) 10001-00</small></p>
--	--	--



PROMOTIONS

PUC intranet Promotion

Quick Links


- eTime
- Leave Request Workflow
- IT Service Center
- Mocasin Intranet
- Strategic Plan
- Instant Recognition Cards

News and Events Administration

- News Articles
- Events

SFDPC: How to Invest for Your Retirement Printable Version 5/10/2017

By SFERS, San Francisco Deferred Compensation Plan (SFDPC)



Did you know that you could actually be saving more for retirement? Qualified City and County of San Francisco employees can make additional payroll deductions through the San Francisco Deferred Compensation Plan (SFDPC). The SFDPC is an employee benefit offered by the Retirement System (SFERS), allowing you to acquire tax deferred retirement savings through voluntary contributions designed to supplement your pension benefits.

With people living longer and the cost of living getting higher, it's now more important than ever to secure your financial future. You could be saving up to \$18,000 a year in tax deferred benefits, or even more if you're age 50 or over. To learn more about this retirement benefit, visit www.sfdcp.org or call (888) 733-2748, select option 2.

Free Employee Event

SFDPC Presents: How to Invest for Your Retirement.

Are you saving for retirement? If so, are you satisfied with how you're investing? If you're not, do you want to learn how?

As an employee, you can take advantage of a free investing seminar to learn how to maximize your retirement savings! Bring your lunch to this Brown Bag event and enjoy some light refreshments hosted by the San Francisco Deferred Compensation Plan (SFDPC) at the **San Francisco Public Library - Main Library, Latino/Hispanic Community Room on Tuesday, June 13, 2017 at 12 PM OR 1:00 PM**. Two sessions are being offered to accommodate lunch schedules.


Seating is limited, so RSVP by calling 415-487-7500 or email team.sfdcp@sfgov.org

Please provide:


- Your name
- Which session you will attend (12 PM or 1:00 PM)
- The name of your coworker you're attending with, if any

Learn more at www.sfdcp.org.


Related Articles



Sea Level Rise Committee Received Prize for Progress for Guiding Policy to Protect San Francisco's Infrastructure
Thursday, May 11, 2017
(Photo Left) Ana May, Sr. Account Executive, Associate (formerly with AECOM), David Behr, SFDPC Climate Program Director and Anna Roche, SFDPC Climate Program Manager (Photo Right) - Read more



Public Service Recognition Week May 7-13
Monday, May 08, 2017
Public Service Recognition Week, May 7-13. There are many heroes whom we encounter day-to-day, but they may not be. Read more



Performance Management and Appraisal Trainings May to June 2017
Thursday, April 27, 2017
All supervisors and managers who manage or review employee performance are invited to take part in the Performance Management and Appraisal trainings scheduled on May 9, June 1 and June 8.



DPH Newsletter article

SFDPC Presents: How to Invest for Your Retirement

Are you saving for retirement? If so, are you satisfied with how you're investing? If you're not, do you want to learn how? As an employee, you can take advantage of a free investing seminar to learn how to maximize your retirement savings! Bring your lunch to this Brown Bag event at the San Francisco Public Library Main Branch on June 13 at noon or 1pm (two sessions). RSVP by calling 415-487-7500 or emailing team.sfdcp@sfgov.org



City and County of
San Francisco

Deferred Compensation Plan

EVENT
PHOTOS

Session 2



SFDCP Counselor Jasper Smith

Session 1



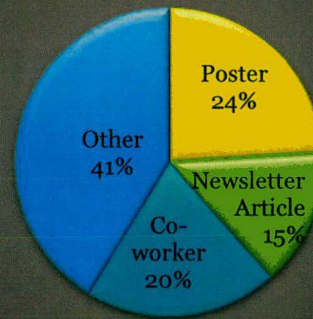


SURVEY RESULTS

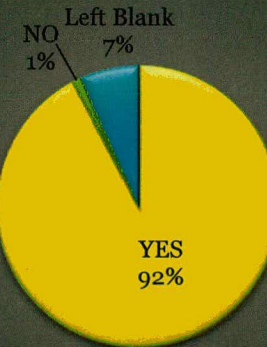
Question 1: Are you a City and County of SF Def comp participant?



Question 2: Where did you hear about today's event?

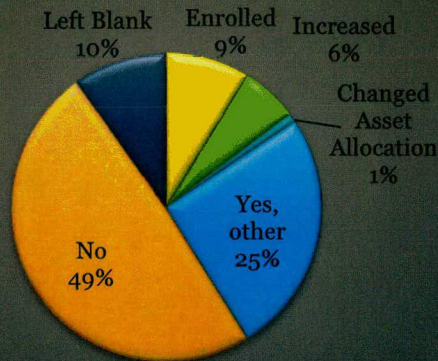


Question 3: Was today's event convenient and beneficial for you to attend?

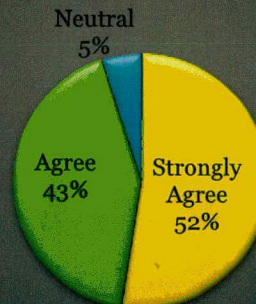


Question 6: Please provide any additional comment. See next page.

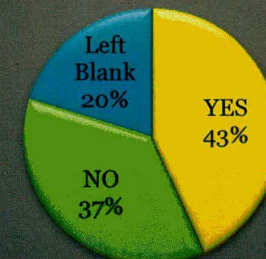
Question 4: Did you take any action today?



Question 5: Today's presentation and presenter was very informative and helpful.



Question 7: Would you like a SFDCP counselor to contact you for a follow-up 1:1 Session?





City and County of
San Francisco
Deferred Compensation Plan

SURVEY RESULTS - COMMENTS

Presenter was great. Wish to borrow against SFDCP. What! You can get a loan!!!

Great presentation and presenter

Great review and entry/New Hire Presentation, Okay for those of us already invested. That's why I asked for a follow-up.

Presenter was very engaging

Great info, didn't know I could borrow from this account.

Great!!

RIN rate is straight up 20% and 7%. Good job!! Record keeper awesome!

Very informative

Is there an easy way to do online live chat or email to ask questions?

This event is necessary particularly for new employees but also for those close to retirement. It provides an understanding for creating and maintaining a portfolio investment.

It would be nice if there was a in office workshop.

Provide (after receiving consent) real city and county of SF deferred compensation retirees and when they started.

Add an option on the form to increase 1% annually

Do you have any SRI? Socially responsible stocks?

Keep it rockin – thank you!!

Should not charge a fee to maintain an account

As most of my co-worker (SFJJC) counselors we moved our retirement fund from SF to Cal Pers and lost an amazing amount

Some good reminders about re-evaluating retirement status on a regular basis – also using the retirement income calculator.

Presentation was great

Wonderful presenter, thank you

Very informational but would like more details!

I am surprised that there is no acknowledgement that the audience is probably going to have a pension. Which offers fixed income security to our portfolio!

Great enthusiasm! Kind of a recent a new hire and recent graduate so this information is broken down in such a helpful way. Thanks.

Great presentation! I loved that Jasper was enthusiastic and entertaining! :)

Would have liked more details about expense ratios (or where to find them)

Entertaining



City and County of
San Francisco
Deferred Compensation Plan

SURVEY RESULTS - COMMENTS

I would have liked more info on investing and investments

Loved Jasper Smith

Jasper Smith is very professional, knowledgeable, engaging and entertaining

Got me into action about investing

Good location and time

Why I am pay interest and fees you holding my money

It would be helpful to email the powerpoint presentation with the event notification

I am interested in group presentation

Very informative and engaging

I started 2 years ago because someone came to the lunch room at my work and Jasper changed my life.

I have met with Jasper previously and he is very knowledgeable

Too basic

Clever and informative

He is very personable

I misunderstood when I received the email, I thought this was for pension retirement and what options are available after retirement it would not hurt to add some info in this respect.

It helped to have copies of the power point in the folder. Thanks for getting back to me short notice on attending.

This is helpful

Full and helpful information, thank you.

More details on core investment options would be good

Great overview; what about more details, great pics + website info

I am okay where I am, thank you

The presentation provided some overview info but I would have preferred a bit more detail regarding sign up options/plans monthly amount impacts my income etc.

Would like onsite workshop

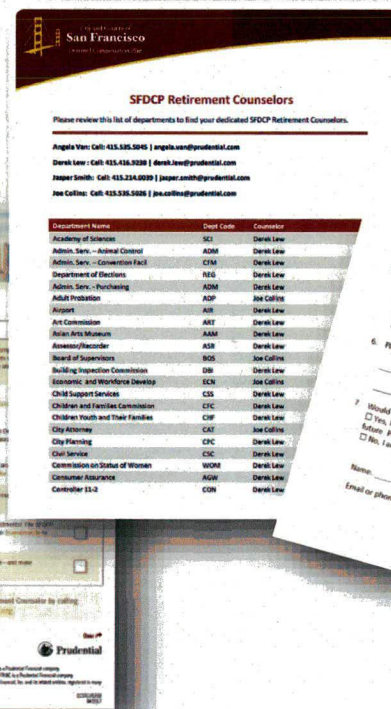
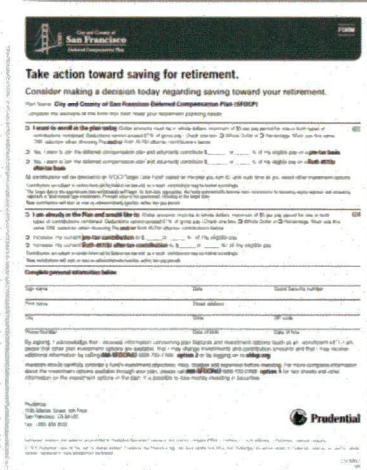
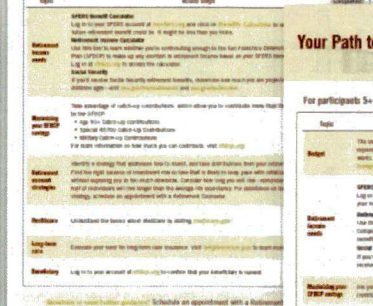
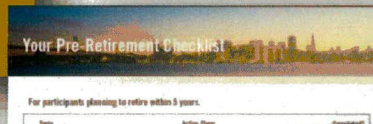
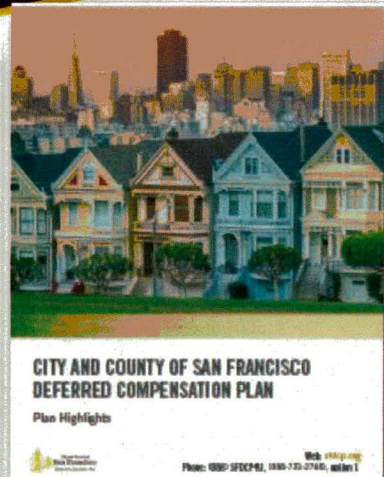
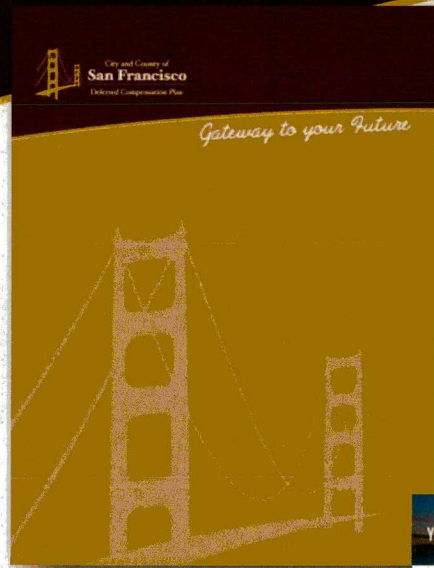


City and County of San Francisco

Deferred Compensation Plan

SUMMARY OF MATERIALS

- Plan highlights (new abbreviated version, less paper)
- Take action form
- Survey
- Near Retirement / Path to Retirement Checklists
- Copy of the presentation slides
- Business card with Plan contact information
- Retirement Counselors Department Listing



City and County of San Francisco
 1145 Market Street, 5th Floor
 San Francisco, CA 94103
 Monday-Friday
 8 a.m. to 5 p.m. PT
 sfdcp.org

SFCDP Administration Team
 Call: 415-487-7500

SFCDP Retirement Counselors
 Call: 888-SFDCP4U
 (888-733-2748), Option 2