

**Deferred Compensation Program
Brown Bag Training Classes
2012**

Course Name	Date	Start	End	Location
2012 Plan Enhancements - Funds, Fees, Roth, etc.	1/5/2012	12:00 PM	1:00 PM	City Hall - 200 East Santa Clara St., Wing 262
2012 Plan Enhancements - Funds, Fees, Roth, etc.	1/10/2012	12:00 PM	1:00 PM	Water Pollution Plant, 700 Los Esteros, Admin. Bldg., Conference Room B
2012 Plan Enhancements - Funds, Fees, Roth, etc.	1/10/2012	12:00 PM	1:00 PM	Police Administrative Building - 201 West Mission, Room 314
2012 Plan Enhancements - Funds, Fees, Roth, etc.	1/11/2012	12:00 PM	1:00 PM	City Hall - 200 East Santa Clara St., Wing 262
2012 Plan Enhancements - Funds, Fees, Roth, etc.	1/12/2012	12:00 PM	1:00 PM	Central Service Yard 1660 Senter Rd. Building A, Lunch Room, 1st Floor
2012 Plan Enhancements - Funds, Fees, Roth, etc.	1/17/2012	12:00 PM	1:00 PM	City Hall - 200 East Santa Clara St., Wing 262
2012 Plan Enhancements - Funds, Fees, Roth, etc.	1/18/2012	12:00 PM	1:00 PM	Muni Water - 3025 Tuers Rd., Administrative Conference Room
2012 Plan Enhancements - Funds, Fees, Roth, etc.	1/19/2012	12:00 PM	1:00 PM	Retirement Services 1737 North 1st Street, 5th Floor, Administrative Conference Room
2012 Plan Enhancements - Funds, Fees, Roth, etc.	1/19/2012	12:00 PM	1:00 PM	Airport Administration - 1701 Airport Blvd., McDonald Douglas Conference Room
2012 Plan Enhancements - Funds, Fees, Roth, etc.	1/24/2012	12:00 PM	1:00 PM	DOT - Mabury Yard, 1404 Mabury Rd., North Conference Room
Morningstar Advice Online	2/7/2012	12:00 PM	1:00 PM	Central Service Yard 1660 Senter Rd., Building A, Ready Room, 1st Floor
Morningstar Advice Online	2/9/2012	12:00 PM	1:00 PM	City Hall - 200 East Santa Clara St., Wing 262
Morningstar Advice Online	2/15/2012	12:00 PM	1:00 PM	DOT - Mabury Yard, 1404 Mabury Rd., North Conference Room
SJDCP Website - Account Access, Tools and Calculators	3/8/2012	12:00 PM	1:00 PM	City Hall - 200 East Santa Clara St., Wing 262
SJDCP Website - Account Access, Tools and Calculators	3/15/2012	12:00 PM	1:00 PM	Police Administrative Building - 201 West Mission, Room 314
457 Deferred Compensation-Catch-Up Provisions-Age 50/3 Year Special	4/10/2012	12:00 PM	1:00 PM	Water Pollution Plant, 700 Los Esteros, Admin. Bldg., Conference Room B
457 Deferred Compensation-Catch-Up Provisions-Age 50/3 Year Special	4/12/2012	12:00 PM	1:00 PM	Airport Administration - 1701 Airport Blvd., McDonald Douglas Conference Room
Website Tools and the New Deferred Compensation Plan Mobile Application - <i>New for 2012</i>	5/8/2012	12:00 PM	1:00 PM	Central Service Yard 1660 Senter Rd. Building A, Ready Room, 1st Floor
Website Tools and the New Deferred Compensation Plan Mobile Application - <i>New for 2013</i>	5/10/2012	12:00 PM	1:00 PM	City Hall - 200 East Santa Clara St., Wing 262
Website Tools and the New Deferred Compensation Plan Mobile Application - <i>New for 2014</i>	5/15/2012	12:00 PM	1:00 PM	DOT - Mabury Yard, 1404 Mabury Rd., North Conference Room
Website Tools and the New Deferred Compensation Plan Mobile Application - <i>New for 2015</i>	5/17/2012	12:00 PM	1:00 PM	Water Pollution Plant, 700 Los Esteros, Admin. Bldg., Conference Room B
Website Tools and the New Deferred Compensation Plan Mobile Application - <i>New for 2016</i>	6/7/2012	12:00 PM	1:00 PM	Animal Shelter - 2750 Monterey Road, Training Room
Website Tools and the New Deferred Compensation Plan Mobile Application - <i>New for 2017</i>	6/12/2012	12:00 PM	1:00 PM	Airport Administration - 1701 Airport Blvd., McDonald Douglas Conference Room
457 Deferred Compensation-Catch-Up Provisions-Age 50/3 Year Special	6/14/2012	12:00 PM	1:00 PM	Police Administrative Building - 201 West Mission, Room 314
Morningstar Advice Online	7/10/2012	12:00 PM	1:00 PM	Central Service Yard 1660 Senter Rd. Building A, Ready Room, 1st Floor
Morningstar Advice Online	7/12/2012	12:00 PM	1:00 PM	City Hall - 200 East Santa Clara St., Wing 262
Morningstar Advice Online	7/18/2012	12:00 PM	1:00 PM	Police Administrative Building - 201 West Mission, Room 314

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Charting Your Own Course - SJDCP Investment Options	9/18/2012	12:00 PM	1:00 PM	Animal Shelter - 2750 Monterey Road, Training Room
Charting Your Own Course - SJDCP Investment Options	9/18/2012	12:00 PM	1:00 PM	Airport Administration - 1701 Airport Blvd., McDonald Douglas Conference Room
Staying the Course - Strategies for a Volatile Market	10/9/2012	12:00 PM	1:00 PM	Water Pollution Plant, 700 Los Esteros, Admin. Bldg., Conference Room B
Staying the Course - Strategies for a Volatile Market	10/11/2012	12:00 PM	1:00 PM	City Hall - 200 East Santa Clara St., Wing 262
Staying the Course - Strategies for a Volatile Market	10/18/2012	12:00 PM	1:00 PM	DOT - Mabury Yard, 1404 Mabury Rd., North Conference Room
Deferred Compensation Distribution Options -When and How	11/8/2012	12:00 PM	1:00 PM	City Hall - 200 East Santa Clara St., Wing 262
Deferred Compensation Distribution Options -When and How	11/15/2012	12:00 PM	1:00 PM	Police Administrative Building - 201 West Mission, Room 314
457 Deferred Compensation-Catch-Up Provisions-Age 50/3 Year Special	12/4/2012	12:00 PM	1:00 PM	Central Service Yard 1660 Senter Rd., Building A, Ready Room, 1st Floor
457 Deferred Compensation-Catch-Up Provisions-Age 50/3 Year Special	12/6/2012	12:00 PM	1:00 PM	City Hall - 200 East Santa Clara St., Wing 262

CLASS DESCRIPTION

2012 Plan Enhancements - Funds, Fees, Roth, etc.

Learn the specifics of 2012 Program enhancements, including: new fund line-up, plan expenses, investment mapping, Morningstar Advice, contribution limits and Roth 457.

Website Tools and the new DCP Mobile App!!!! *New for 2012*

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

Staying the Course - Strategies for a Volatile Market

Is the current status of the stock market making you feel like you're caught in the "perfect storm?" "Staying the Course" can provide you with information and options to help you stay focused and see what alternatives are available to help you continue to reach your retirement objectives.

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

Age 50" - This provision allows participants to make additional contributions as they approach retirement.

"Special 3 Year Catch-Up" - When your eligible; How eligibility is calculated; How the rules have changed; When you **CANNOT** use. Eligibility to deposit unused vacation and sick leave.

SJDCP Website - Account Access, Tools and Calculators

Account Access - how to set up and access your account. Review of menu options such as; current cash values, daily unit values and interest rates.

An introduction to the Tools and Calculators available to plan participants, including: Income Wizard, Account Gateway, Determine Your Needs, Model Investment Portfolio, etc...

Deferred Compensation Distribution Options -When and How

Discussion of when and how the money in your 457 Deferred Compensation Plan is available for distribution. Review of new distribution rules.

Charting Your Own Course - SJDCP Investment Options

Gain a thorough understanding of all investment vehicles to effectively manage your portfolio. Topics include: Understanding Stock Market, Types of Mutual funds, Understanding risk vs. reward, Market Capitalization, Asset Allocation Funds, Diversification, and personal investing principles.

Morningstar Advice Online

Learn how to use the Plan's investment advisory service. Morningstar uses a goal-based approach to recommend the right investment mix for your situation.