

**Deferred Compensation Program
Brown Bag Training Classes
2010**

Course Name	Date	Start	End	Location	Instructor	Attendance
SJDCP - What It Is and How It Works	1/5/2010	12:00 PM	1:00 PM	Animal Shelter	Steve Moy	
SJDCP - What It Is and How It Works	1/7/2010	12:00 PM	1:00 PM	City Hall - 200 East Santa Clara W120	Peter Ng	
Asset Allocation	1/14/2010	12:00 PM	1:00 PM	DOT - Maybury Yard, 1404 Maybury Rd. North Conference Room	Peter Ng	
Asset Allocation	1/21/2010	12:00 PM	1:00 PM	City Hall - 200 East Santa Clara W120	Gary Bozin	
Asset Allocation	1/21/2010	12:00 PM	1:00 PM	Police Administrative Building - 201 West Mission, Room 314	Peter Ng	
Charting Your Own Course - SJDCP Investment Options	2/4/2010	12:00 PM	1:00 PM	City Hall - 200 East Santa Clara W120	Steve Moy	
Charting Your Own Course - SJDCP Investment Options	2/9/2010	10:30 PM	11:30 PM	Airport - Facilities Conference Room, 1401 Airport Blvd.	Peter Ng	
Charting Your Own Course - SJDCP Investment Options	2/16/2010	12:00 PM	1:00 PM	Airport - 1732 No. 1st St., Neil Armstrong Conference Room	Peter Ng	
MorningStar Advice Online	2/18/2010	12:00 PM	1:00 PM	City Hall - 200 East Santa Clara W120	Gary Bozin	
MorningStar Advice Online	2/23/2010	12:00 PM	1:00 PM	Central Service Yard 1660 Senter Rd. Building A, Ready Room, 1st Floor	Steve Moy	
MorningStar Advice Online	3/2/2010	12:00 PM	1:00 PM	Airport - 1732 No. 1st St., Neil Armstrong Conference Room	Peter Ng	
SJDCP Website - Account Access, Tools and Calculators	3/2/2010	12:00 PM	1:00 PM	Water Pollution Plant, 700 Los Esteros, Admin. Bldg., Conference Room A	Steve Moy	
SJDCP Website - Account Access, Tools and Calculators	3/4/2010	12:00 PM	1:00 PM	City Hall - 200 East Santa Clara W120	Peter Ng	
SJDCP Website - Account Access, Tools and Calculators	3/4/2010	12:00 PM	1:00 PM	Central Service Yard 1660 Senter Rd. Building A, Ready Room, 1st Floor	Steve Moy	
Investing - Destination Retirement - <i>New for 2010!</i>	3/15/2009	12:00 PM	1:00 PM	Central Service Yard 1660 Senter Rd. Building A, Ready Room, 1st Floor	Steve Moy	
Investing - Destination Retirement - <i>New for 2010!</i>	3/16/2010	12:00 PM	1:00 PM	Water Pollution Plant, 700 Los Esteros, Admin. Bldg., Conference Room A	Steve Moy	
Investing - Destination Retirement - <i>New for 2010!</i>	3/18/2010	12:00 PM	1:00 PM	City Hall - 200 East Santa Clara W120	Gary Bozin	
Catch-Up Provisions-Age 50/3 year Special	4/1/2010	12:00 PM	1:00 PM	City Hall - 200 East Santa Clara W120	Peter Ng	
Catch-Up Provisions-Age 50/3 year Special	4/5/2010	12:00 PM	1:00 PM	Old MLK - 170 West San Carlos Street, 4th Floor Conference Room	Steve Moy	
Catch-Up Provisions-Age 50/3 year Special	4/6/2010	12:00 PM	1:00 PM	Water Pollution Plant, 700 Los Esteros, Admin. Bldg., Conference Room A	Steve Moy	
Budgeting	5/6/2010	12:00 PM	1:00 PM	City Hall - 200 East Santa Clara W120	Peter Ng	
Budgeting	5/17/2010	12:00 PM	1:00 PM	Central Service Yard 1660 Senter Rd. Building A, Ready Room, 1st Floor	Steve Moy	
Budgeting	5/18/2010	12:00 PM	1:00 PM	Water Pollution Plant, 700 Los Esteros, Admin. Bldg., Conference Room A	Steve Moy	

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Distribution Options - When and How	5/13/2010	12:00 PM	1:00 PM	DOT - Maybury Yard, 1404 Maybury Rd. North Conference Room	Peter Ng	
Distribution Options - When and How	5/20/2010	12:00 PM	1:00 PM	City Hall - 200 East Santa Clara W120	Steve Moy	
Distribution Options - When and How	5/20/2010	12:00 PM	1:00 PM	Police Administrative Building - 201 West Mission, Room 314	Peter Ng	
The Road to Retirement	6/3/2010	12:00 PM	1:00 PM	City Hall - 200 East Santa Clara W120	Gary Bozin	
The Road to Retirement	6/8/2010	12:00 PM	1:00 PM	Water Pollution Plant, 700 Los Esteros, Admin. Bldg., Conference Room A	Steve Moy	
The Road to Retirement	6/10/2010	12:00 PM	1:00 PM	Central Service Yard 1660 Senter Rd. Building A, Ready Room, 1st Floor	Steve Moy	
SJDCP Website - Account Access, Tools and Calculators	6/15/2010	12:00 PM	1:00 PM	Animal Shelter	Steve Moy	
SJDCP Website - Account Access, Tools and Calculators	6/17/2010	12:00 PM	1:00 PM	City Hall - 200 East Santa Clara W120	Peter Ng	
SJDCP Website - Account Access, Tools and Calculators	6/22/2010	12:00 PM	1:00 PM	Central Service Yard 1660 Senter Rd. Building A, Ready Room, 1st Floor	Steve Moy	
Retirement Readiness	7/6/2010	12:00 PM	1:00 PM	Central Service Yard 1660 Senter Rd. Building A, Ready Room, 1st Floor	Steve Moy	
Retirement Readiness	7/8/2010	12:00 PM	1:00 PM	City Hall - 200 East Santa Clara W120	Peter Ng	
Retirement Readiness	7/8/2010	12:00 PM	1:00 PM	Old MLK - 170 West San Carlos Street, 4th Floor Conference Room	Steve Moy	
Retirement Planning for Women	9/16/2010	12:00 PM	1:00 PM	City Hall - 200 East Santa Clara W120	Gary Bozin	
Retirement Planning for Women	9/16/2010	12:00 PM	1:00 PM	Airport - 1732 No. 1st St., Neil Armstrong Conference Room	Peter Ng	
Staying the Course - Strategies for a Volatile Market	10/14/2010	12:00 PM	1:00 PM	DOT - Maybury Yard, 1404 Maybury Rd. North Conference Room	Peter Ng	
Staying the Course - Strategies for a Volatile Market	10/15/2010	12:00 PM	1:00 PM	City Hall - 200 East Santa Clara W120	Steve Moy	
Staying the Course - Strategies for a Volatile Market	10/21/2010	12:00 PM	1:00 PM	Police Administrative Building - 201 West Mission, Room 314	Peter Ng	
Distribution Options - When and How	11/4/2010	12:00 PM	1:00 PM	City Hall - 200 East Santa Clara W120	Steve Moy	
Distribution Options - When and How	11/9/2010	10:30 PM	11:30 PM	Airport - Facilities Conference Room, 1401 Airport Blvd.	Peter Ng	
Distribution Options - When and How	11/16/2010	12:00 PM	1:00 PM	Airport - 1732 No. 1st St., Neil Armstrong Conference Room	Peter Ng	
SJDCP - What It Is and How It Works	11/18/2010	12:00 PM	1:00 PM	City Hall - 200 East Santa Clara W120	Gary Bozin	
SJDCP - What It Is and How It Works	11/23/2010	12:00 PM	1:00 PM	Central Service Yard 1660 Senter Rd. Building A, Ready Room, 1st Floor	Steve Moy	
Catch-Up Provisions-Age 50/3 year Special	12/9/2010	12:00 PM	1:00 PM	City Hall - 200 East Santa Clara W120	Gary Bozin	

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Catch-Up Provisions-Age 50/3 year Special	12/9/2010	12:00 PM	1:00 PM	Police Administrative Building - 201 West Mission, Room 314	Peter Ng	
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CLASS DESCRIPTION

457 Deferred Compensation - What It Is and How It Works

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 contributions and tax-deferred growth.

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.

Budgeting

Do you know where the money goes? These budgeting tips can help you make ends meet, and help you better prepare for your future.

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...

Retirement Readiness

Does retirement seem like an ever-moving target? Allow us to point out how smart steps today can help you arrive better prepared for tomorrow's big day.

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.

The Road to Retirement

Retirement is fast approaching. But do you know about all of your options for paying yourself in retirement?

Investing - Destination Retirement

Before embarking on your investing journey, be sure you understand what roadblocks may lie in your path. In addition, begin to plan your retirement road map to plan out the journey ahead.