



Voluntary Employee Beneficiary Association (VEBA) Opt-In Checklist

If you are considering electing to opt-in to the VEBA, please use this checklist:

- Attend a group presentation where the VEBA will be discussed.
You can find information about these presentations at this website:
www.sanjoseca.gov/VEBA

- Review VEBA related materials.
 - Program Description
 - Election Form
 - Frequently Asked Questions (FAQs)

- Make an appointment with Parallel Advisors to discuss your option.
You can make an appointment by contact veba@sanjoseca.gov or calling 408-535-VEBA (8322).

- Consult financial, tax, and legal advisors prior to selecting the VEBA.

- Forms - All VEBA participants need to complete and sign the enclosed form.
 - VEBA Election Form

Submit all completed forms to Human Resources Attn: HR-VEBA during the election period:
Wednesday, October 18, 2017 to Friday, December 1, 2017.