



Finance Department
Pension Administration Division
Pension Partners
Helping You Plan, Prepare, and Prosper



Individual Consultations		
Dates	Wednesday, March 20, 2013	Monday, March 25, 2013
Location	DCHS 2525 Mount Vernon Avenue Admin Conference Room (2 nd Floor)	City Hall 301 King Street Sister Cities 1102
Topics and Times	<p style="text-align: center;">Individual Consultation with ICMA-RC Financial Planner <u>Steve Taylor, CFP</u></p> <p style="text-align: center;">40 minutes sessions 8:30 a.m. – 5 p.m.</p> <p>You may discuss any personal financial planning topic, including saving and investing for retirement, insurance needs, college funding, managing your retirement income, your estate plan, etc.</p> <p>The counselor may better understand your financial circumstances if you bring a summary of:</p> <ul style="list-style-type: none"> • Your family budget and debt; • Your mortgage and taxes; • All of your savings plans; • Your pension and 457 Plan information; and • Your spouse’s earnings and pensions. <p>You might want to bring any current pension and 457 plan statements you have.</p> <p>Spouses are welcome to attend.</p>	<p style="text-align: center;">Consultation With ICMA-RC Retirement Specialist <u>Gloria Moody</u></p> <p style="text-align: center;">30 minute sessions 9 a.m. – 4 p.m.</p> <p>During the meeting you may:</p> <ul style="list-style-type: none"> • Enroll in the 457 Deferred Compensation Plan or the Payroll Deduct Roth IRA Plan; • Register and set up your password for the 457 Plan or the Roth IRA plan; • Learn how to use the ICMA-RC system to make changes to beneficiaries, investments, etc.; • Change your contribution amounts; • Learn about the catch-up provisions for employees who are age 50 or older or within three years of their unreduced retirement date; and • Discuss other related matters.
TO RSVP	Email Steven Taylor at STaylor@icmarc.org with the times that you are available.	Call Gloria Moody at 1.866.328.4666 to schedule a time.

Be sure to obtain advance approval from your supervisor if you plan to attend a seminar during your scheduled work hours.

Any questions can be directed to Kadira Coley at Kadira.Coley@alexandriava.gov or 703.746.3879.