



# Pension Partners

## Pension Division

Helping You Plan, Prepare, Prosper



Investment Seminars		
<b>Dates and locations</b>	<b>Thursday, December 6, 2007</b> <b>Public Safety Center</b>	<b>Friday, December 7, 2007</b> <b>Lee Center</b>
<b>Investment Seminars</b> <i>(Please choose one session)</i>	<b>Sheriff</b> Roll Call Room AM Session: Noon – 1:30 PM PM Session: 4:30 – 6:00 PM	Gold Room 1 8:30 AM – 10:00 AM
<b>Individual Retirement Planning</b> (30 minutes) <i>Appointment required</i>	<b>Police</b> Roll Call Room 2:00 PM – 4:30 PM 6:30 PM – 8:30 PM	Conference Room 1 10:30 AM – Noon 1:00 PM – 5:00 PM
<b>Speakers</b>	John Perugini, Prudential Financial Services Steven Bland, City of Alexandria	
<b>Reservations Required</b>	Email Nadine Walton at <a href="mailto:nadine.walton@alexandriava.gov">nadine.walton@alexandriava.gov</a> to select the time and the date of the seminar you will attend or to request a 30-minute private Individual retirement planning session. Please put “Investment Seminar” in the subject line and provide a phone number where you can be contacted 9 AM – 11 AM to confirm the appointment.	

Intended Audience:

**Employees with City Retirement Income Accounts (R.I.P.)** One R.I.P. (City funded defined contribution plan) is the closed plan for Firefighters and Police officers who did not “turn their money over” to the new plan. The other R.I.P. is for Deputy Sheriffs, EMTs, and Fire Marshals.

These seminars may also be of general interest to anyone participating in the City’s Deferred Compensation Plan managed by ICMA-RC. Keep in mind that ICMA-RC and Prudential have different investment choices and this seminar is specifically geared toward Prudential investments.

Seminar Topics:

Asset allocation, portfolio construction, risk, general financial planning

Individual Retirement Planning:

**Appointment required.** The counselor from Prudential Financial Services will better understand your financial circumstances if you prepare a summary of: your savings, pension, home mortgage, taxes, spouse’s earnings and pension information, and your family budget sheet and any debt you have. Please bring your most recent Social Security statement plus the statements for any of these plans that you participate in: Retirement Income Account, Virginia Retirement System (VRS), Supplemental Retirement Plan, and 457 Deferred Compensation Plan with ICMA-RC. *(The representative from Prudential will be the only person reviewing your personal information.)*

**Please speak to your supervisor for approval and scheduling**