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| **Date/Time** | **Class Title** | **Description** | | **Location** | **Presenter** |
| October 1  Wednesday  12:00-1:00 PM | PERS ONLINE  TIER 1 & TIER 2 | Tier 1 – Hired before 1-1-1996  Tier 2 – Hired between 1-1-1996 and 8-28-2003  If you were hired after 8-28-2003 this class does not pertain to you. You need the OPSRP Class. Training will last approximately one hour. Bring your most recent pay stub and most recent PERS statement to class. | | Multnomah Bldg  501 SE Hawthorne  Basement PC Room  B15 | **Amanda Devilbiss**  Voya Financial  (formerly ING) |
| October 2  Thursday  12:00-1:00 PM | PERS ONLINE  OPSRP | OPSRP – Hired on or after 8-29-2003  If you were hired before 8-29-2003 this class does not pertain to you. You need the PERS Tier 1 & Tier 2 Class. Bring your most recent pay stub and your most recent PERS statement to class. | | Multnomah Bldg  501 SE Hawthorne  Basement PC Room  B15 | **Melinda Lewis**  Voya Financial  (formerly ING) |
| October 6  Monday  12:00-1:00 PM | RETIREMENT READINESS | Voya Financial representatives will be presenting a workshop for employees to learn how to put all of the pieces together and prepare for retirement. Start now! It is never too early. There are a lot of moving parts: Deferred Comp, PERS/OPSRP Pension, PERS IAP, Social Security, Health Benefits and other pieces. Come discuss how all of these parts work together, who to contact, and when all of the paperwork needs to be submitted. This class will take the full hour to cover everything. Please hold questions until the end as a representative will stay 30 minutes after for follow up. | | Multnomah Bldg  501 SE Hawthorne  1st Floor  Boardroom | **Melinda Lewis**  Voya Financial  (formerly ING) |
| October 8  Wednesday  12:00-1:00 PM | NEW EMPLOYEE ORIENTATION | Open for all Newly Hired Benefit Eligible Multnomah County Employees as well as anyone hired after August 28, 2003. Come learn more about your retirement benefits. This course will cover the Deferred Compensation 457(b) offered through the County as well as an overview of OPSRP and the IAP benefits. Presented by your Voya Financial representatives. | | Multnomah Bldg  501 SE Hawthorne  Horsetail Falls  Room 380 | **Melinda Lewis**  Voya Financial  (formerly ING) |
| October 9  Thursday  12:00-1:00 PM | RETIREE 101 | Planning for health and life insurance coverage is an important part of retirement planning. This brown bag will focus on the County Retiree Health Insurance Program including: 1) participation requirements, 2) age and years of County service requirements for the medical premium subsidy, 3) coverage for family members, and 4) how Medicare may impact this coverage. The County Life Insurance Program is also a County-paid benefit available to eligible County retirees. Information will be provided on how to qualify for this benefit. | | Lincoln Bldg  421 SW Oak  1st Floor  Pine Room | **Jeanie Staino**  **& Vanesa Mujcic**  Employee Benefits |
| October 9  Thursday  12:00-1:00 PM | MAKE THE MOST  OF YOUR CREDIT | Sound credit management practices can mean better rates and terms when you borrow, saving you money over your lifetime. Learn how to maximize your credit score by understanding what five factors influence your score, and come away with over 15 specific tips for improving your report and score. Learn how to order and read a credit report and find available resources. You will take home a wide variety of helpful reference materials. | | Yeon Complex  1600 SE 190th  Room 215 | **Brian Fassett**  Advantis |
| October 10  Friday  12:00-1:00 PM | RETIREE 101 | Planning for health and life insurance coverage is an important part of retirement planning. This brown bag will focus on the County Retiree Health Insurance Program including: 1) participation requirements, 2) the age and years of County service requirements for the medical premium subsidy, 3) coverage for family members, and 4) how Medicare may impact this coverage. The County Life Insurance Program is also a County-paid benefit available to eligible County retirees. Information will be provided on how to qualify for this benefit. | | Hansen Building  12240 NE Glisan  Auditorium | **Jeanie Staino**  **& Marla Imsland**  Employee Benefits |
| October 13  Monday  12:00-1:00 PM | RETIREMENT  READINESS | Voya Financial representatives will be presenting a workshop for employees to learn how to put all of the pieces together and prepare for retirement. Start now! It is never too early. There are a lot of moving parts: Deferred Comp, PERS/OPSRP Pension, PERS IAP, Social Security, Health Benefits and other pieces. Come discuss how all of these parts work together, who to contact, and when all of the paperwork needs to be submitted. This class will take the full hour to cover everything. Please hold questions until the end as a representative will stay 30 minutes after for follow up. | | Lincoln Bldg  421 SW Oak  1st Floor  Pine Room | **Amanda Devilbiss**  Voya Financial |
| October 14  Tuesday  12:00-1:00 PM | PERS  OVERVIEW | The PERS Overview presentation is a broad overview of PERS Tier One and Tier Two, OPSRP and the Individual Account Program (IAP). Topics covered include membership and vesting issues, retirement eligibility; benefit calculations and payment options. | | Lincoln Building  421 SW Oak  1st Floor  Oak Room | **Representative**  PERS |
| October 14  Tuesday  12:00-1:00 PM | SOCIAL SECURITY | * + Today’s recipients – Importance & Pressures   + Future & concerns for change   + Your Entitlement & Payment Amount   + Taxes & Earnings Limits | * + Benefits for family members (incl.survivors)   + Disability Benefits   + Medicare Coverage   + Preparation Tools | Multnomah Bldg  501 SE Hawthorne  Basement General  Training Room | **Alan Edwards**  Social Security |
| October 15  Wednesday  12:00-1:00 PM | SOCIAL SECURITY | * + Today’s recipients – Importance & Pressures   + Future & concerns for change   + Your Entitlement & Payment Amount   + Taxes & Earnings Limits | * + Benefits for family members (incl.survivors)   + Disability Benefits   + Medicare Coverage   + Preparation Tools | Lincoln Bldg  421 SW Oak  1st Floor  Pine Room | **Alan Edwards**  Social Security |
| October 20  Monday  12:00-1:00 PM | ACCESSING YOUR  DEF COMP ACCT AFTER YOU LEAVE MULTCO | How do I access money from my deferred compensation account when I leave MultCo employment? Do I have to make a decision on taking my money right away? Do I have to roll it to an IRA? Can I leave it alone until I need it? Can I change my mind? A lot has changed in the past 10 years. Come review all of the flexible ways to access money from your account. | | Hansen Building  12240 NE Glisan  Auditorium | **Amanda Devilbiss**  Voya Financial  (formerly ING) |  |
| October 20  Monday  12:00-1:00 PM | DEFERRED COMP  101 | What is Deferred Compensation? Do I need it? Is it different than PERS and the IAP? YES and YES!!! How do deferred compensation contributions affect my net take-home pay? Come compare Traditional 457(b) Pre-Tax savings and the new Roth 457(b) Post-Tax savings options and decide which is best for you. Presenter will cover future account value projections and the effect of inflation on your retirement savings. | | Multnomah Building  501 SE Hawthorne  5h Floor  Copper Room | **Kristin Walter**  Voya Financial  (formerly ING) |  |
| October 21  Tuesday  11:00 AM- 2:00 PM | FINANCIAL FITNESS FAIR | Stop by the fair and meet representatives from the following:   * Deferred Compensation (Advantis and Voya Financial) * Financial Lending Institutions (Advantis, HomeStreet) * Multnomah County Benefits * Multnomah County Retirement Benefits Program * Multnomah County Wellness * PERS * Social Security * Tax-advantaged health reimbursement plan (HRA VEBA) | | Lincoln Bldg  421 SW Oak  1st Floor  Oak Room | **See**  **DESCRIPTION**  **Column** |
| October 22  Wednesday  11:00 AM- 2:00 PM | FINANCIAL FITNESS FAIR | Stop by the fair and meet representatives from the following:   * Deferred Compensation (Advantis and Voya Financial) * Financial Lending Institutions (Advantis, HomeStreet) * Multnomah County Benefits * Multnomah County Retirement Benefits Program * Multnomah County Wellness * PERS * Social Security * Tax-advantaged health reimbursement plan (HRA VEBA) | | Multnomah Bldg  501 SE Hawthorne  1st Floor  Boardroom | **See**  **DESCRIPTION**  **Column** |
| October 23  Thursday  1:00 -3:00 PM | FINANCIAL FITNESS FAIR | This fair is in conjunction with the City of Gresham  Stop by the fair and meet representatives from the following:   * City of Gresham Benefits * Deferred Compensation (Advantis and Voya Financial) * Financial Lending Institutions (Advantis, HomeStreet) * Financial Products, Long Term Investing (MassMutual Financial Group) City of Gresham * Multnomah County Benefits * Multnomah County Retirement Benefits Program * PERS * Social Security * Supplemental Insurance (Aflac) * Tax-advantaged health reimbursement plan (HRA VEBA) * Plus many MORE!   Regarding Multco Wellness –  Literature will be available, however no representative will be on site | | Gresham City Hall  1333 NW Eastman Parkway  Conference Center/  Trail Rooms | **See**  **DESCRIPTION**  **Column** |
| October 24  Friday  12:00-1:00 PM | MAKE THE MOST OF YOUR CREDIT | Sound credit management practices can mean better rates and terms when you borrow, saving you money over your lifetime. Learn how to maximize your credit score by understanding what five factors influence your score, and come away with over 15 specific tips for improving your report and score. Learn how to order and read a credit report and find available resources. You will take home a wide variety of helpful reference materials. | | Hansen Building  12240 NE Glisan  Auditorium | **Brian Fassett**  Advantis |
| October 27  Monday  12:00-1:00 PM | PERS OVERVIEW | The PERS Overview presentation is a broad overview of PERS Tier One and Tier Two, OPSRP and the Individual Account Program (IAP). Topics covered include membership and vesting issues, retirement eligibility; benefit calculations and payment options. | | Hansen Building  12240 NE Glisan  Auditorium | **Representative**  PERS |
| October 27  Monday  12:00-1:00 PM | MAKE THE MOST OF YOUR CREDIT | Sound credit management practices can mean better rates and terms when you borrow, saving you money over your lifetime. Learn how to maximize your credit score by understanding what five factors influence your score, and come away with over 15 specific tips for improving your report and score. Learn how to order and read a credit report and find available resources. You will take home a wide variety of helpful reference materials. | | Multnomah Building  501 SE Hawthorne  5th Floor  Copper Room | **Brian Fassett**  Advantis |
| October 30  Thursday  12:00-1:00 PM | PERS HEALTH  BENEFIT OPTIONS | At retirement there are many different options for health insurance. How do you decide which insurance program or health plan is best for you? The PERS Health Insurance Program is available to all PERS retirees and dependents who meet the eligibility criteria. The program provides medical and dental insurance plan options as well as long term care insurance for Oregon PERS retirees. | | Multnomah Building  501 SE Hawthorne  5th Floor  Copper Room | **Danielle Keyser**  PERS |
| October 30  Thursday  12:00-1:00 PM | RETIREMENT READINESS | Voya Financial representatives will be presenting a workshop for employees to learn how to put all of the pieces together and prepare for retirement. Start now! It is never too early. There are a lot of moving parts: Deferred Comp, PERS/OPSRP Pension, PERS IAP, Social Security, Health Benefits and other pieces. Come discuss how all of these parts work together, who to contact, and when all of the paperwork needs to be submitted. This class will take the full hour to cover everything. Please hold questions until the end as a representative will stay 30 minutes after for follow up. | | Yeon Annex  1600 SE 190th  Room 215 | **Melinda Lewis**  Voya Financial  (formerly ING) |
| October 31  Friday  12:00-1:00 PM | PERS  OVERVIEW | The PERS Overview presentation is a broad overview of PERS Tier One and Tier Two, OPSRP and the Individual Account Program (IAP). Topics covered include membership and vesting issues, retirement eligibility; benefit calculations and payment options. | | Multnomah Building  501 SE Hawthorne  5th Floor  Copper Room | **Representative**  PERS |
| Nov. 4  Tuesday  12:00-1:00 PM | VOYA Financial Web Enhancements | New Web Enhancements to your MultCo Deferred Compensation Plan through Voya Financial. Walk through the new features and options to help guide you toward retirement. Introducing Orange Money! Learn what the balance of your account and the contributions you are making actually mean for you in retirement. You will need to log into your own account. Please bring your username and password to the class. If you have not established a username and password, please visit [www.voyaretirementplans.com/custom/multnomah](http://www.voyaretirementplans.com/custom/multnomah) to get setup prior to the class. If you have trouble logging in, please contact [800.584.6001](tel:800.584.6001) for assistance. | | Multnomah Bldg  501 SE Hawthorne  Basement  PC Room – B15 | **Amanda Devilbiss**  Voya Financial  (formerly ING) |
| Nov. 5  Wednesday  12:00-1:00 PM | VOYA Financial Web Enhancements | New Web Enhancements to your MultCo Deferred Compensation Plan through Voya Financial. Walk through the new features and options to help guide you toward retirement. Introducing Orange Money! Learn what the balance of your account and the contributions you are making actually mean for you in retirement. You will need to log into your own account. Please bring your username and password to the class. If you have not established a username and password, please visit [www.voyaretirementplans.com/custom/multnomah](http://www.voyaretirementplans.com/custom/multnomah) to get setup prior to the class. If you have trouble logging in, please contact [800.584.6001](tel:800.584.6001) for assistance. | | Multnomah Bldg  501 SE Hawthorne  Basement  PC Room – B15 | **Kristin Walter**  Voya Financial  (formerly ING) |