

Item 8

Fresno County

457 Deferred Compensation Plan

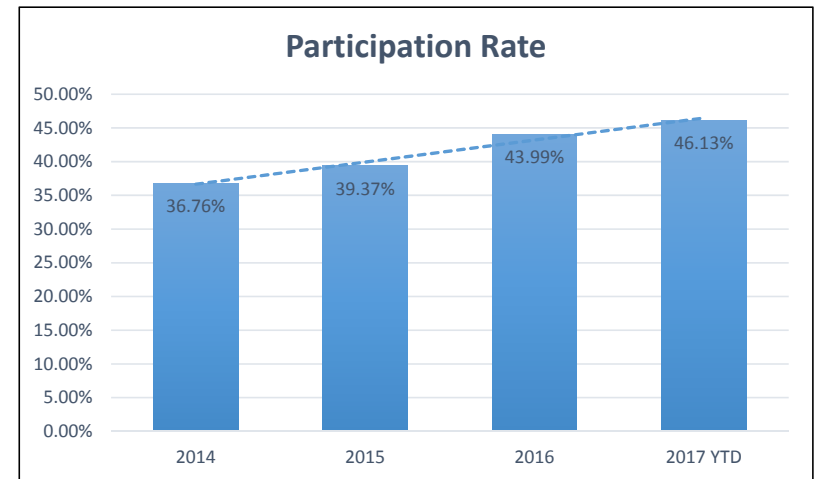
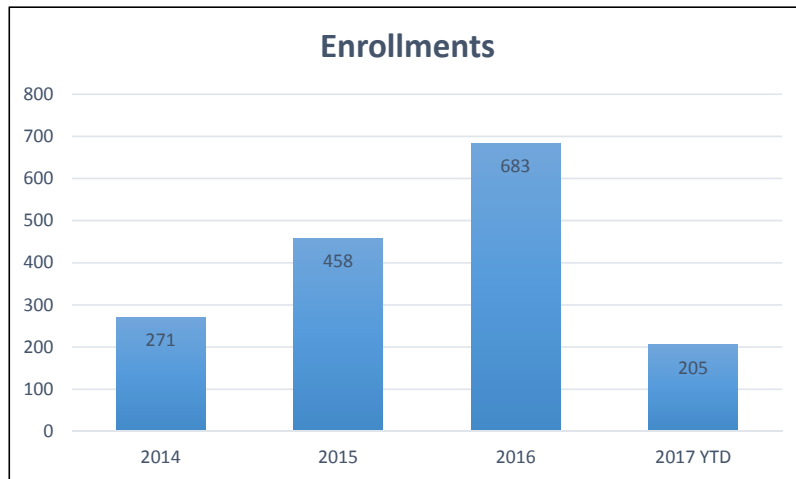
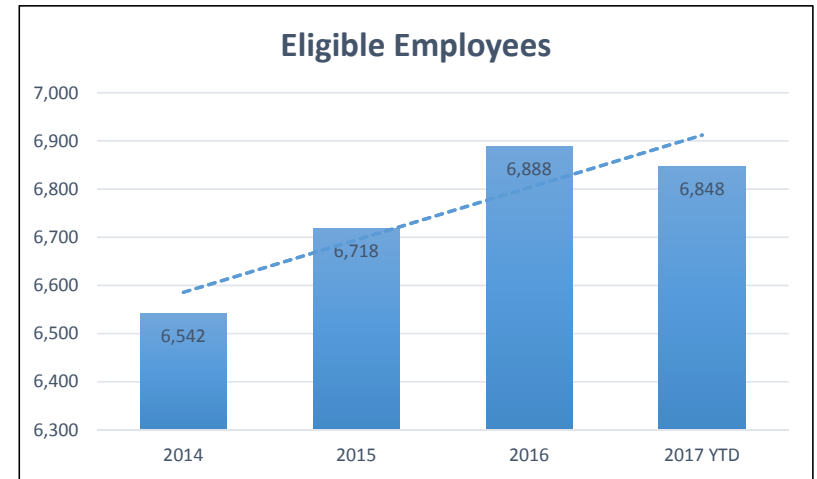
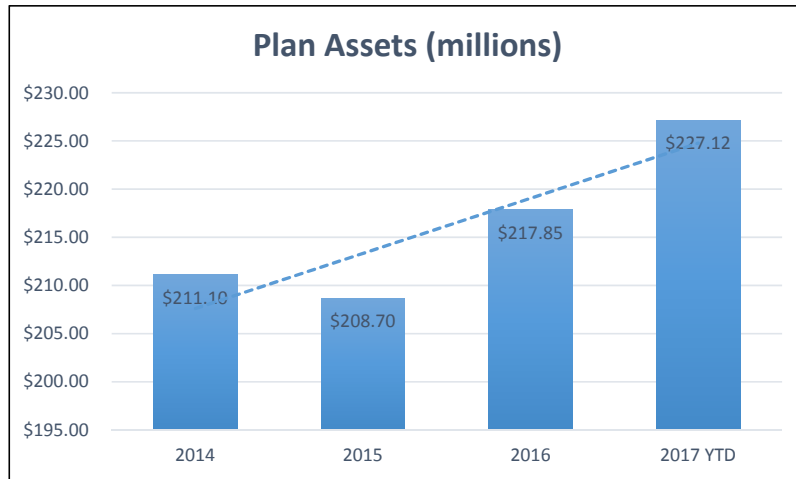
Quarterly Dashboard – March 31, 2017



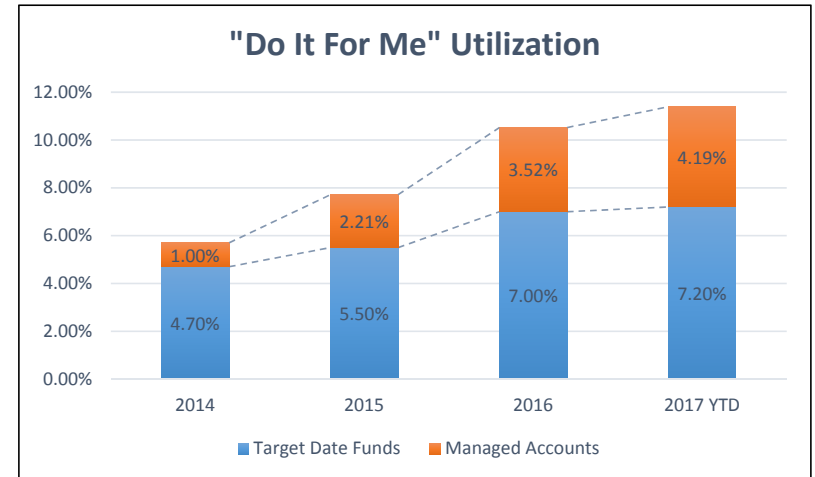
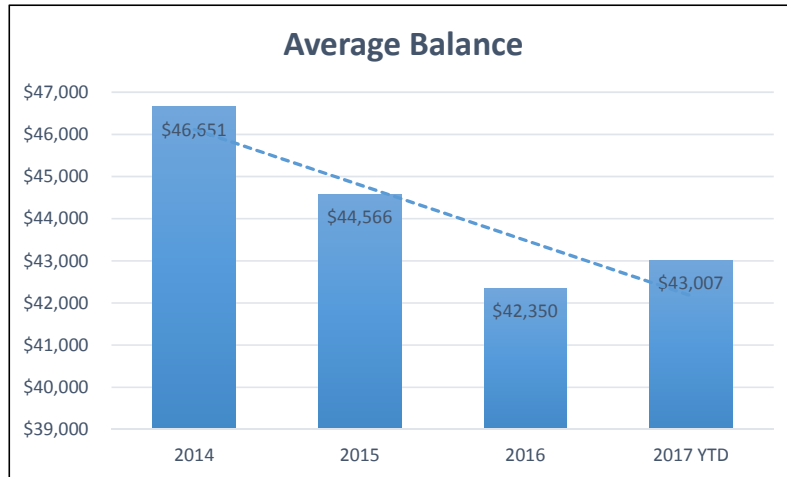
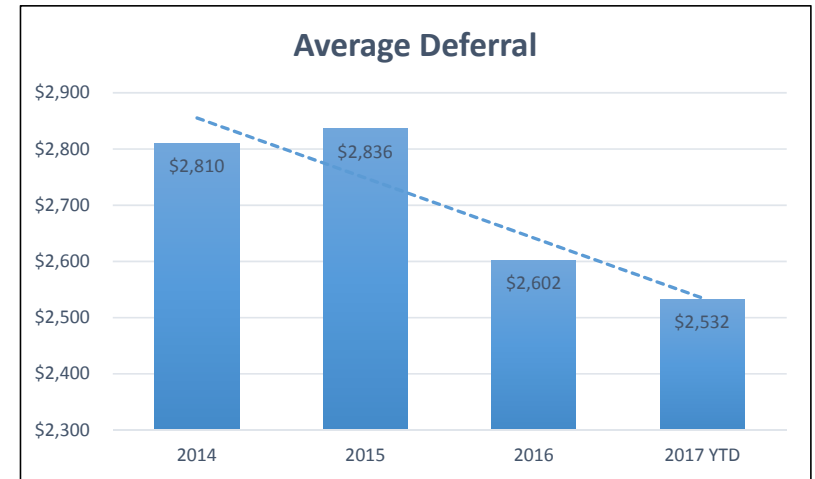
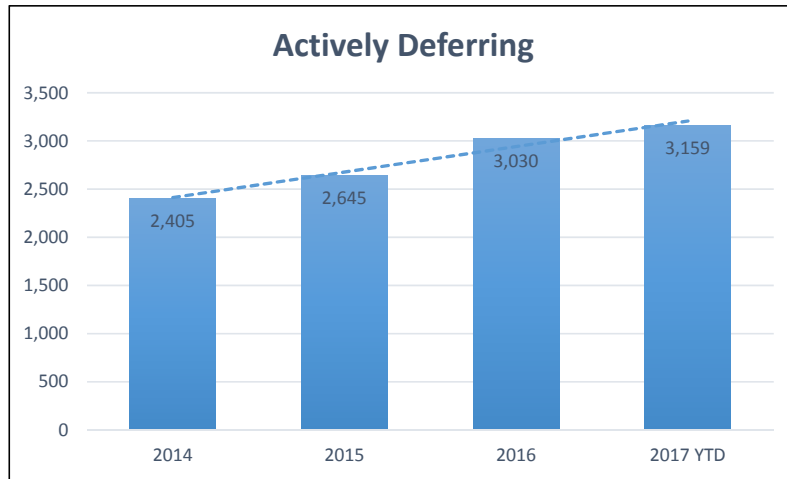
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Section 1 Executive Summary



Section 1 Executive Summary



FRESNO COUNTY SERVICE RECAP

NATIONWIDE RETIREMENT SOLUTIONS

3/31/2017

Quick Plan Facts

	As of 3/31/2017	% Change from 3/31/2016
Total Participant Count	5,281	+12.1%
New Enrollments YTD	205	+133%
Total Plan Assets (millions)	\$227.12	+8.9%
Total Deferrals YTD (millions)	\$2.18	+16.5%
Total Rollovers-In (thousands)	\$434.48	+55.5%
ProAccount Assets (millions)	\$9.519	+70.3%
ProAccount Participant Count	294	+55.6%

Education, Workshops and Counseling

Date	Event/Activity	Results
January	FCERA Nearing Retirement Workshop	Ongoing
January – March	Bi-weekly New Employee Training	Ongoing
March 20 – 26	Save Today Expo	Results Below

Save Today Expo Recap

Total Participant Contacts: 531 Employees

Total New Enrollments: 102

Total Deferral Increases: 210

Total Beneficiary Updates: 146

Education Campaigns

EZ Enrollment – All Fresno County Employees

EZ Increase – All Enrolled Fresno County Employees

Asset Allocation – 2nd Quarter 2017

Local Nationwide Service Team

Ed Malone – Program Director/614-327-2218/malonee@nationwide.com

Phillip Edwards – Retirement Specialist/ 559-999-7971/edwarp4@nationwide.com



Fresno County Plan Objectives

Promote Plan Enrollment

1

Strategy: Educate participants on the importance and benefits of proper asset allocation and encourage participating employees to consolidate their accounts.

- Provide print materials – EZ Enrollment Form
 - Fresno County Save Today Expo – March 20-24
 - Communicate directly with participants/individual consultations
 - New Employee Orientation/County Benefits Fairs
-

Encourage your participants to increase their contributions

2

Strategy: Inform plan participants about taking advantage of the opportunities to increase their contributions and explore the long-term benefits of saving more now.

- Provide print materials – EZ Increase Form
 - Fresno County Save Today Expo – March 20-24
 - Communicate directly with key participant segments
 - Participants currently close to the max limit, age 50+ for Catch Up, or those who have not increased in the last year
-

Promote plan diversification

3

Strategy: Educate participants on the importance and benefits of proper asset allocation.

- Provide print materials
 - Conduct group educational presentations, topic: Asset Allocation, Investor Profile
 - Fresno County Save Today Expo – March 20-24, 2017
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