



PASSPORT TO FINANCIAL WELLNESS

Your 401(a) and 457(b) plans, working together, are your ticket to a more secure retirement. The 401(a) is your primary retirement plan that you are automatically enrolled in after 12 months of service. The 457(b) is a voluntary plan you can sign up for at any time if you want to save even more.

Learn more: Visit www.DCRetire.com and click Education to sign up for an on-site education seminar. Or contact your local service team to enroll.

Email
service@DCRetire.com

Visit a service center
77 K Street, NE, 8th Floor
202-759-7190
202-759-7192

441 4th Street, NW, Suite 340N
202-442-9749
202-442-9640



1 401(a) Educational Seminar

Mandatory attendance to complete financial wellness program

The 401(a) Retirement Plan offered by the Office of Finance and Treasury and the D.C. Department of Human Resources is your primary savings plan for your retirement. Learn about the features of this plan including contributions, investment options, vesting, distributions and more.

PRESENTER: _____ DATE: _____

2 457(b) Educational Seminar

Mandatory attendance to complete financial wellness program

A 457(b) Plan is a retirement savings plan and investment vehicle with tax advantages. Learn how this plan complements your 401(a) Retirement Plan offered by the District of Columbia.

PRESENTER: _____ DATE: _____

3 To complete the Financial Wellness Passport, you must attend TWO of the four seminars below:

INVESTMENT SEMINAR: JUGGLING FINANCIAL GOALS

Saving for multiple things — a house, car, college, emergency fund, retirement — can be a challenge. And what if you have debt to pay down, too? Learn some basic steps to help you organize and reach your goals.

PRESENTER: _____ DATE: _____

INVESTMENT SEMINAR: GET TO KNOW YOUR ROTH OPTIONS

Roth contributions and conversions give you another tax-advantaged option in your 457 plan, allowing you to benefit from tax-free withdrawals. Do they make sense for you?

PRESENTER: _____ DATE: _____

YOUR SAVING AND INVESTING GOALS

Whether you're just starting out or need to make sure you're still on track, setting goals related to how much you save and how you invest is key to a better financial future. We'll explore how to make these goals more real and realistic.

PRESENTER: _____ DATE: _____

BUILD YOUR INVESTMENT PORTFOLIO

How do you choose your investments? Just looking at past performance or how the markets are doing is usually unwise. Instead, we'll review strategies to help you find the right balance of risk and reward in a diversified portfolio.

PRESENTER: _____ DATE: _____

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