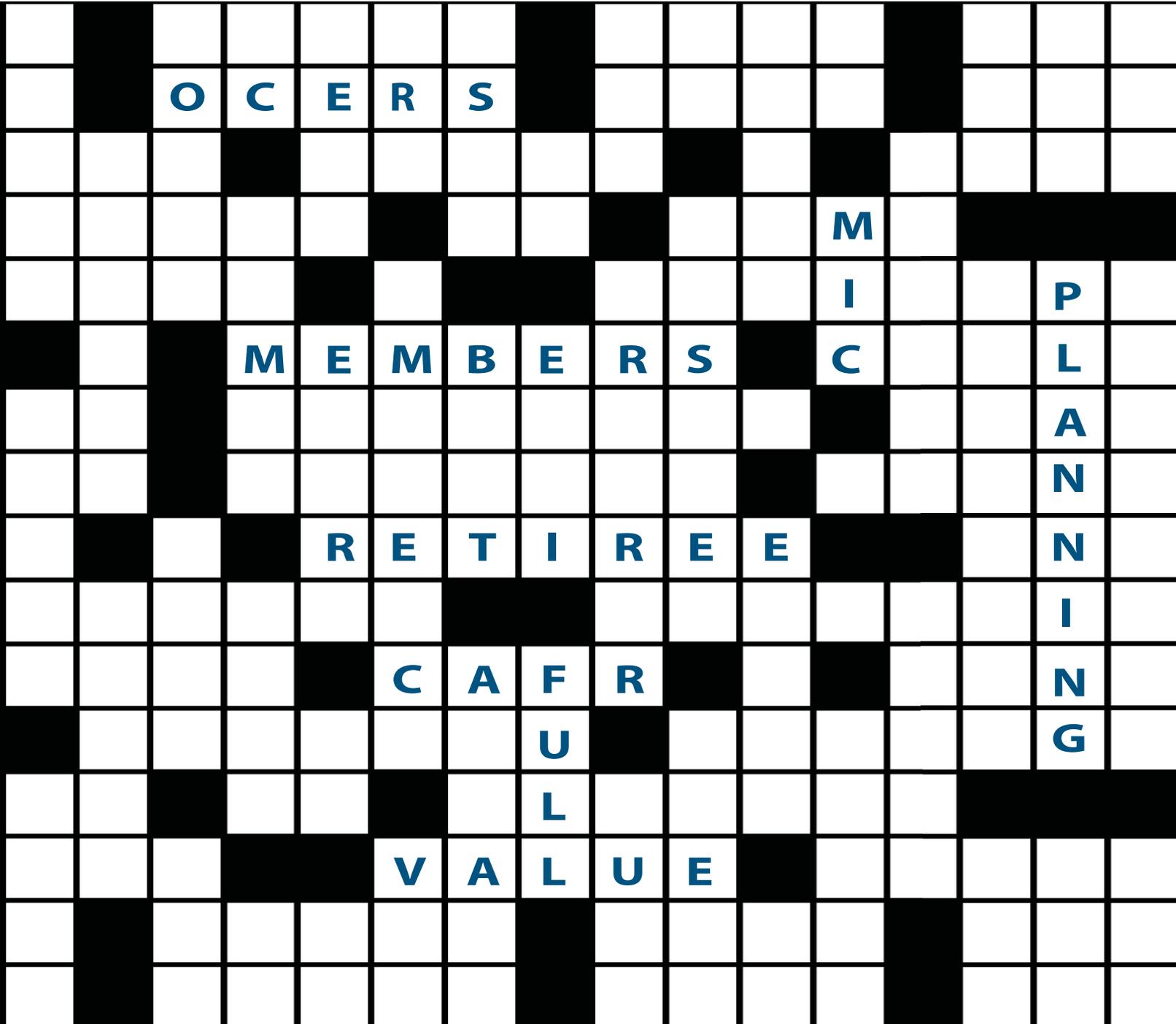


At Your Service

Orange County Employees Retirement System

Volume 9 Number 3 Magazine for all Members July 2010



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At Your Service



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At Your Service is published for members and retirees of the Orange County Employees Retirement System

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At Your Service is written and designed by
Robert Kinsler and Jayne Ritchey

Board of Retirement Meetings:

All regular business meetings are held in OCERS Board Room at 8:30 a.m.

January 19, 2010	February 16, 2010
March 22, 2010	April 19, 2010
May 24, 2010	June 21, 2010
July 19, 2010	August 23, 2010
October 18, 2010	November 22, 2010
	December 20, 2010

Pre-Retirement Seminars

While it's easy to live for today, the transition into retirement requires plenty of advance planning. OCERS is offering Pre-Retirement Seminars this summer to help you gather information you'll need to meet your retirement goals.

The few hours you spend at the seminar can have a beneficial and long-lasting impact on your quality of life after you retire. Anyone who is within three years of their retirement date should plan on taking this seminar.



These daytime seminars will be held at OCERS, 2223 E. Wellington Ave., Suite 100, Santa Ana, from 8 a.m. to 1 p.m. on July 7 and 21; Aug. 4 and 18; and Sept. 8 and 22, 2010. The one-session, five-hour seminar is free, and there is plenty of free on-site parking for those attending.

Various topics will be covered. A Social Security representative will discuss Social Security and Medicare benefits; a representative from "Deferred Compensation" will discuss the County's 457 plan; a representative from Retiree Medical will discuss the County's retiree medical benefit options; and an OCERS Retirement Specialist will focus on your OCERS retirement benefits.

No advance registration is necessary and this information will help prepare you for the move into retirement. Members are welcome to take this seminar as often as they like.

For more information on OCERS' retirement seminars, please visit www.ocers.org and click on "Retirement Seminars."

What is a public record?

OCERS is subject to the California Public Records Act, which requires that certain records be disclosed to the public if requested. OCERS is also subject to certain provisions of the California Government Code known as the '37 Act, which states if an individual member record is requested, and disclosing it is not necessary for the administration of OCERS, then written permission from the member or a court order is necessary before OCERS can release the record.

There are certain pieces of information that are already publicly disclosed by OCERS at its board meetings. These are the names of members who have filed for retirement along with the agency they work for, and additionally, in the case of members who file for disability retirement, the last position held. Also, we disclose the names of members and beneficiaries who pass away.

Last year, an organization called The California Foundation for Fiscal Responsibility, (CFFR), requested the name, monthly pension amount and last agency worked for all retirees and beneficiaries receiving \$8,333 or more in any month in 2009. OCERS denied the request and advised CFFR that they either had to obtain written permission from each retiree and beneficiary or a court order. CFFR filed a writ in Superior Court to obtain a court order and was successful.

The order was not limited to just the retirees and beneficiaries receiving \$8,333 or more in any month. The court addressed the type of records being sought, i.e., the name, pension amount and last agency worked, and concluded that those three components were not considered an individual member record and therefore not confidential.

What does this mean for OCERS' members and beneficiaries? It means that, if requested, OCERS is now required to disclose the name, pension amount and last agency worked for any retired member or beneficiary, regardless of the amount of their benefit. Other information that constitutes individual member records, such as a member's age, address, social security number, and telephone number will not be released without either written permission from the member or beneficiary, or a court order.

OCERS will post all public records requests on our Web site along with an indication of which records we will disclose, so each member and beneficiary can see what is being requested and what we plan to release.

Annual Health Plan Open Enrollment update

The annual Open Enrollment period for retirees enrolled in a County of Orange retiree health plan will be Monday, Nov. 1, 2010 through Tuesday, Nov. 23, 2010. If you have experienced a change of address, please contact the Benefits Resource Line to report that change. Make sure to review your Open Enrollment package that will be mailed to your home address on or before Nov. 1. For more information, please visit the Benefits Center Web site at www.benefitsweb.com/countyoforange.html or contact the Benefits Resource Line toll-free at 1-866-325-2345.

Financial Strategy Seminars help prepare for retirement

If you are planning to retire within the next 3 to 30 years, you should plan to attend a free Financial Strategies for Retirement Planning Seminar.

Financial Strategies Seminars are held at:

OCERS (Training Room)
2223 E. Wellington Avenue, Suite 100
Santa Ana, CA 92701-3161

The Financial Strategies for Retirement Planning Seminar consists of a three-session workshop. Each meeting will cover important topics for successful planning. The third meeting concentrates on information from an OCERS representative. Individuals and couples are welcome to attend. There is plenty of free on-site parking for those attending.

Various topics of interest and importance will be covered over the course of the three-session workshop. Some of them are:

- Deferred Compensation investment choices
- Tax-free and low-cost investing for profit
- How to determine retirement goals
- Investment choices to consider in the current stock market

The third meeting of each workshop focuses on information relating to OCERS, including such topics as:

- Eligibility for retirement
- Reciprocal benefits
- Benefit calculations, and how to apply for your retirement benefits from OCERS online
- How to determine your future OCERS benefit

Don't miss out on this valuable information. It will help you prepare for your future. The seminars are free, but reservations are required. To make your reservation to attend this seminar, please log on at www.ocers.org and click on "Retirement Seminars."

An important note: anyone registering for the Financial Strategy Seminar should plan on attending all three sessions. For more information on upcoming Financial Strategies for Retirement Planning Seminars, please call Robert Kinsler at (714) 558-6230.

SCHEDULED DATES:

The Financial Strategy Seminar is a three-session workshop, and persons signing up should plan on attending all three sessions of the workshop.

Dates are as follows:

Workshop

Wednesdays

July 7, 14 and 21, 2010

6 – 9:30 p.m.

Workshop

Wednesdays

September 1, 8 and 15, 2010

6 – 9:30 p.m.

Workshop

Wednesdays

October 6, 13 and 20, 2010

6 – 9:30 p.m.

Workshop

Wednesdays

November 3, 10 and 17, 2010

6 – 9:30 p.m.

Focus Groups bring insight to OCERS

In late 2009, OCERS hosted a series of Focus Groups geared toward retirement-related issues, including the actual process of retirement and how our retirees feel about resources and services they receive from their retirement system.

Participants spoke quite favorably about their interactions with OCERS, but did provide constructive input in terms of areas where the retirement system could improve services for members. Among the changes implemented based on input at the Focus Groups is the inclusion of more in-depth information about OCERS' investments in print publications such as *At Your Service* and online, and ongoing improvements to the Pre-Retirement Seminar. Another key finding to emerge out of the Focus Groups is that members who spent time planning for their retirement and attended OCERS seminars found the transition into retirement much easier than members who hadn't done so.



The Board of Retirement and members of OCERS' staff want to thank all 41 of the members who participated in the series of Focus Groups last year, and we look forward to meeting more members this year.

We are now seeking Active Members interested in helping us shape new resources and programs, as well as improve existing services including OCERS' Web site, financial seminars and new publications. We are using Focus Groups and invite you to attend. You are the ultimate judge of how well we are doing, which is why it is important for you to share your opinion with us. This is your chance to share your ideas with us in a fun and informal setting, telling us what you like and don't like.

Because of the wide variety of work schedules of our members, OCERS will coordinate with interested members to meet either at lunch or after work. A free lunch or light dinner will be provided for those who attend.

If you are an Active Member and interested in participating in upcoming Focus Groups, please contact Communications Manager Robert Kinsler at 714-558-6230. You can also get more information at www.ocers.org.

On the move? Please keep your employer and OCERS updated

Is your address within your agency's payroll system correct? Please look at your most recent pay stub to verify that your home address is accurate. To correct your address, contact the Human Resources Specialist or Payroll Representative within your Agency/Department as soon as possible.

If you are a retiree and plan on moving, please make sure to contact OCERS as soon as possible to keep us updated with a current address and phone number so you continue to receive important information from us, including your 1099-R Form in early 2011.

Margaret 'Peg' Jones honored

Although she recently celebrated her 89th birthday, Margaret "Peg" Jones works full-time at the Health Care Agency's Behavioral Health Services and continues to inspire both workers and retirees with her dedication to her job and family. Peg is OCERS' oldest active member and has worked for the County of Orange for more than 30 years.

On May 18, 2010, Peg was honored at the W.I.S.E. (Working Involved Senior of Excellence) Award Ceremony; she was presented her award by Amanda Blake Secola, publisher of *Not Born Yesterday!* Magazine (the sponsor of the event). The keynote speaker at the event was actress Pauline Wagner, 99, who appeared in many movies during the 1930s and 1940s.

Among those in attendance at the ceremony held at California Mission Inn in Rosemead, CA were many members of Peg's family, including two of her daughters who are County of Orange employees and another daughter who works for the County of San Bernardino.

"I'm interested in genealogy and our family tree goes back to the 1600s in Pennsylvania, Virginia and New Jersey," said Peg's daughter Sandy Corder, a Program Manager in the Health Care Agency. "We have had relatives working in government for hundreds of years." Her sister Jane Dawson is Manager of CEO Volunteer and Intern Resources at the County of Orange.



Peg Jones' family came to celebrate her W.I.S.E. Award. From left, son Tom Jones, granddaughter Ashleigh Comstock-Jones, daughter Jane Dawson (CEO Manager, Volunteer/Intern Resources), daughter Eileen Eglund (Public Access ADA Coordinator with the County of San Bernardino), Peg Jones (Senior Office Supervisor D, HCA), granddaughter Jyl Wood, daughter Sandy Corder (ADAS Program Manager with HCA) and Sandy's husband, Dave Corder (a former employee of Child Support Services).

OCERS' Web site offers key resources for Retirees

Since the introduction of the Member Information Center on OCERS' Web site in 2007, thousands of OCERS members have taken advantage of the growing number of resources on the Member Information Center (also known as the "MIC").

In recent months, the MIC has been enhanced so Retirees will find it easier to use, even while the interactive site provides them the ability to access a growing number of key resources 24 hours a day, seven days a week.

One of the new features available on the MIC is the ability for OCERS to post both all-retiree and member-specific announcements in an individual member's account. So for example, if OCERS is mailing out 1099-R forms on a specific date, an announcement can be posted on the home page of any Retiree visiting the MIC. But if OCERS is having trouble getting an important notice to an individual Retiree, a specific message for that person can quickly be posted on the home page of that member's MIC account. This dynamic technology is one of many ways OCERS is hoping to improve service.



Once a Retiree has logged into their account using their User Name and Password, there are easy-to-use tabs at the top of the page that allow the member to navigate throughout the site. On the "Profile" page, Retirees can confirm important information such as the names of their beneficiaries and the percentage in their COLA Bank. The "Tax Withholding" tab allows retired members to change their tax withholding amount utilizing both Federal and State of California sections displayed on the screen.

One of the most useful tabs is the "Payment History" page, where Retirees can view details about their 13 most recent benefit payments and print out copies of their pay check stubs. Another tab provides "Direct Deposit" Account information and even allows a Retired Member to make changes online. Finally, another tab provides "1099" information and allows members to print their 1099-R information.

If you have lost your PIN number and/or have never used the MIC, you will need your PIN to create your "User Name" and "Password." To get a PIN, please call OCERS at 714-558-6200. To access the MIC, please visit www.ocers.org and click on the Member Information Center "Member Login" button.

And of course, the MIC has a number of resources for both active and deferred members as well, including the ability for them to gain access to details about their beneficiaries, employment history, benefit formula ("Plan Type") and even use an interactive Benefit Estimator to calculate their retirement.

Orange County Employees Retirement System
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Comprehensive Annual Financial Report, Popular Annual Financial Report available online

The 2009 Comprehensive Annual Financial Report (CAFR) is now available to view or print from OCERS' Web site. In addition, copies of the 124-page document will be available at OCERS' office in Santa Ana beginning Aug. 1, 2010. Information in the CAFR is designed to provide a complete and accurate review of the year's operations. It contains information about OCERS' investments, financial statements, funding status and membership for the year ended Dec. 31, 2009.

The 2009 edition of the Popular Annual Financial Report (PAFR) for the year ended Dec. 31, 2009 is also available to view and print online or obtain at our office. This financial report is a short summary of our financial report written in plain English.

The CAFR and PAFR are among the many resources and information available to members at OCERS' Web site. To view the CAFR or PAFR online, learn about upcoming retirement seminars or download copies of brochures on a number of important topics, please log on at www.ocers.org.

