

**SAN MATEO COUNTY  
DEFERRED COMPENSATION ADVISORY COMMITTEE  
WEDNESDAY OCTOBER 27, 2021 (9:00 AM–12:30 PM)**

**RETREAT**

**LOCATION: ZOOM: <https://smcgov.zoom.us/j/97587018749>  
Dial-In: 669-900-6833; Meeting ID: 975 8701 8749**

Committee Members	Appointed As...
Lisa Okada, Chair	Human Resources Director Designee
Tiffany Htwe	Tax Collector-Treasurer Designee
Laurel Finnegan	Non-Management Appointee
Lilibeth Dames	Non-Management Appointee
Robert Raw	Non-Management Appointee
Steve Perry	Non-Management Appointee
Bridget Love	Management Appointee
Michael Wentworth	Management Appointee
Victoria Mejia	Management Appointee

Staff	Empower	NFP
Ann Parada	Una Morabito	Bill Tugaw
Kim Pearson	Tina Wilson	Paul Hackleman
Marife Viola	Trish McGinity	
Jay Castellano	Patrick McCann	
	Dario Gomez-Garcia	
	Bob Gleason	
	Patrick Washington	
	Armando Llanes	

CALL TO ORDER

ROLL CALL

ORDERS OF THE DAY

PUBLIC COMMENTS



1. Approval of Resolution Pursuant to AB 361 (Jay Castellano)

RETREAT ITEMS

2. Introduction (Jay Castellano)
3. Financial Wellness
  - A. Review of Currently-Available Financial Wellness Resources
    - i. Empower—Future Participant Experience (Tina Wilson)
    - ii. Employee Benefits (Kim Pearson)
  - B. Best Practices from Other Plans
    - i. NFP (Bill Tugaw & Paul Hackleman)
    - ii. Empower Team
  - C. DCAC Discussion: “Gaps” in County Financial Wellness (Jay Castellano)
    - i. Brainstorm
    - ii. Priorities
  - D. Next Steps (Jay Castellano)
4. Cyber-Security (Trish McGinity) TIME-CERTAIN at 10:30am
  - A. Ways Empower is Protecting Data
  - B. An Overview of Fraud Prevention and Client Protection Measures
  - C. Empower’s Response to the DOL Cybersecurity Best Practices
  - D. What we can all do to improve data security?
5. Retiree Education
  - A. Topic: Retirement Services Group (Patrick McCann)
  - B. Topic: Rollouts
    - i. How Big of a Problem Is It? (Paul Hackleman)
    - ii. County of San Mateo versus Peer Plans (Paul Hackleman)
    - iii. Strategies for Minimizing Rollouts to “Predatory” Entities (Paul Hackleman)
  - C. Distribution Channels Specific to Retirees
    - i. Employee Benefits (Kim Pearson)
    - ii. Review of 2021 NAGDCA Award-Winning Education & Communication Programs (Jay Castellano)
  - D. DCAC Discussion: “Gaps” in County Retiree Education (Jay Castellano)
    - i. Brainstorm
    - ii. Priorities
  - E. Next Steps (Jay Castellano)

NEXT MEETING AGENDA ITEMS

ADJOURNMENT