



The University of Arizona  
College of Social & Behavioral Sciences  
Staff Advisory Council

**Spring 2008 Brown Bag Series**  
**USB Room 214**  
**12:00 – 1:00 pm**  
**Wednesday, March 19, 2008**

**“Joining a Voluntary Retirement Plan”**  
**John McPherson**

If you receive paychecks from the University of Arizona, then you are eligible to join the Deferred Compensation Plan (also called the 457 plan) as well as the Tax Sheltered Annuity Plan (also called the TSA or 403(b) plan). Why should you consider participating in a voluntary retirement plan? When is the best time to begin participating or increasing contributions? What should you look for when you select a vendor or read an investment prospectus?

This workshop will provide you with: 1) an overview and comparison of the University’s voluntary retirement plans, 2) tips for selecting a voluntary retirement plan vendor that will meet your needs, 3) examples of investment and vendor fees, 4) a process for selecting plan investments, 5) options for maximizing contributions, 6) how to read a prospectus and a monthly statement, and 7) when to consider using a professional financial advisor.

**Bring your lunch and join us!**

Light refreshments will be provided.

Special thanks to Josephine Castro, Leave Management and Retirement Advisor, for arranging this special session.