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NEWS to USE

FOR EMPLOYERS

Public Employee Retirement System of Idaho

March 2018

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RETIREMENT PLANNING AND FINDING A FINANCIAL ADVISOR: ADVICE FROM A PERSI RETIREE

Make sure to watch and share with employees a great new ten minute advice video featuring retired and former Boise Police Chief Mike Masterson and retired PERSI Trainer Mike Mitchell.

They discuss the importance of retirement planning, researching and finding the right financial advisor to help meet their needs in retirement. The full video is posted on PERSI's website under Video Vault/Employer Videos and Video Vault/Members. The video is also segmented in 10 easy individual links for easier viewing.



[CLICK HERE TO WATCH](#)

PERSI CHOICE 401(k) PLAN MANAGER COMING TO VISIT

Starting this March, PERSI Choice 401(k) Plan Manager, Diane Kaiser will be back on the road for more face-to-face meetings with employer payroll and human resources contacts. The purpose is to provide information about the Choice 401(k) Plan and employer tips, and some recent changes. Diane is also excited to share a growing library of communication materials developed in conjunction with PERSI's record keeper, Empower Retirement.

A Retirement Plan Counselor with Empower Retirement will join her at these meetings. They are solely dedicated to educating PERSI employers and members about the Choice Plan as well as retirement planning in general.

This will also be an opportunity for employers to ask questions about PERSI and the PERSI Choice 401(k) Plan. PERSI hopes you will plan on attending one of the meetings scheduled in your area. Diane can be reached at diane.kaiser@persi.idaho.gov or (208) 287-9256 if you have any questions and/or would like to discuss about PERSI Choice 401(k) Plan.



[CLICK HERE TO SEE
SCHEDULE AND RSVP](#)



DO YOU NEED TO CHANGE AN EMPLOYEE'S MAILING ADDRESS?

When an employee needs to change their mailing address it must be done through their employer's transmittal. The employee may submit a completed **RS110 Change of Address** form (current version on PERSI's website) directly to their payroll department informing the employer of the mailing address change. The employer will notify PERSI via their next transmittal.

The form updates both Base Plan and Choice 401(k) Plan accounts. Once the address change is processed, all statements, correspondence, and tax documents will be mailed to the address of record.

Please remind your terminating employees to contact PERSI if their mailing address should change. They can find the RS110 Change of Address form on PERSI's website.

Terminated, separated, or retired members, may also use the form to notify PERSI directly about a change, or they can make the change in the myPERSI web portal.



DOES YOUR RS110 ADDRESS CHANGE FORM HAVE A BARCODE?

If the RS110 Address Change form you are using doesn't have a barcode at the bottom, it's the old version. The new version can be found on PERSI's website under Employers/Forms. All forms on PERSI's website are the most current versions for employers, members and retirees.

RS110

Revised: 08/2016
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[CLICK HERE FOR CURRENT FORM](#)

PERSI INVESTMENT REPORT

Month to Date Report

February 26, 2018

| | | |
|---|-----------|-----------------------|
| CURRENT VALUE OF THE FUND | \$ | 17,743,467,616 |
| FISCAL YEAR NET CHANGE IN ASSETS | \$ | 1,359,868,217 |
| FISCAL YEAR TO DATE RETURNS | | 9.4% |
| MONTH TO DATE RETURNS | | -1.4% |

Each month, PERSI Chief Investment Officer, Bob Maynard presents his investment report to the PERSI Retirement Board, and posts it to the PERSI website.

