

## Retirement Services

### ***MedExpert International Now Available***



Effective immediately, retirees, survivors, and eligible dependents can access MedExpert, a new program for medical decision support and patient advocacy services.

MedExpert’s medical information technology identifies the most current standard of care of ANY medical condition. And, MedExpert’s on-staff doctors communicate this vital research to you in understandable, caring language.

Their friendly medical information coordinators will help you navigate the complicated world of health-care.

MedExpert will help you make appointments, transfer medical records and coordinate benefits.

All health information is held strictly confidential and is not shared with the City per HIPAA and State confidentiality laws.

To start using your benefit or to get answers to your questions, call MedExpert toll free on 1-800-999-1999, Monday—Friday, between 7AM and 7PM (PST) or visit their website [www.medexpert.com](http://www.medexpert.com) and click on “Member Questions”.

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### ***Retirement Board Governance Outreach***

The City of San Jose is reviewing recommendations for changes in the governance model for the two retirement plans covering City employees.

An Information Memo has been distributed to the City Council on the Retirement Board Governance Stakeholder Outreach that took place in August and early September. The memorandum has been posted on the City’s website at <http://www.sanjoseca.gov/RetirementBoardGovernance.asp>. Please note that there are several attachments to the memo, including a revised report from Cortex, the consultant hired to make recommendations.

Additionally, Frequently Asked Questions (FAQs) have been developed to clarify some of the issues that have been raised during the stakeholder meetings regarding this item. The FAQ’s can also be found on the above mentioned website.

It is anticipated that this item will come back to the City Council by the end of the calendar year with recommendations on the governance structure of the retirement plans.

Stakeholders may provide feedback or comment on the Cortex report or recommendations via email to:

[retirementoutreach@sanjoseca.gov](mailto:retirementoutreach@sanjoseca.gov)

## ***November is Open Enrollment Time***

The month of November is Open Enrollment time for the City of San Jose retirees. You will have the opportunity to ....

- Change your medical, dental and/or vision plans
- Re-enroll if you have dropped your medical, dental and/or vision plans
- Add qualified dependents to your medical, dental and/or vision plans

All Open Enrollment change requests must be submitted by **November 30, 2009** to Retirement Services. To enroll On-Line, visit our website [www.sjretirement.com](http://www.sjretirement.com). Changes will become effective January 1, 2010.

**Please Note: Open Enrollment information will be mailed to all qualifying retirees the last week in October. If you do not receive the information, call us on (408) 794-1018, toll free on (800) 732-6477 to request that one be sent to you, or visit our website [www.sjretirement.com](http://www.sjretirement.com).**

### **ENROLLING AND DISENROLLING IN KAISER SENIOR ADVANTAGE OR AARP MEDICARECOMPLETE (SECURE HORIZONS)**

Eligible members who wish to enroll or disenroll from the Kaiser Senior Advantage or AARP MedicareComplete (Secure Horizons) plans must assign or un-assign their Medicare benefits.

By assigning Medicare, enrollees agree to access medical services solely through the plans' network of doctors and facilities. This means that you can only go to Kaiser doctors and facilities, or any doctor and facility that

will accept the AARP MedicareComplete (Secure Horizons) plan.

In order to change plans and regain traditional Medicare services during Open Enrollment, participants are required to officially disenroll from the Senior Advantage or AARP MedicareComplete plans.

**Please Note: The Blue Shield Medicare PPO and HMO plans, and the PacificCare Senior Supplement plan F, and the Kaiser Medicare Out of Area plan do not require participants to assign Medicare benefits.**

Please contact Retirement Services on (800) 732-6477 or (408) 794-1000 if you wish to enroll or disenroll from the Kaiser Senior Advantage or AARP MedicareComplete (Secure Horizons) plans. We will provide the necessary forms to make the change.

### **OPEN ENROLLMENT REMINDERS**

#### **Full-Time Students**

Dependent children between the ages of 19 and 24 must be unmarried and enrolled as full-time students (12 units or more at an accredited school). You must provide enrollment verification if you wish to enroll or maintain coverage for a full-time student. Verification must be submitted **every semester/quarter** to maintain coverage. Child dependents are dropped from coverage when they fail to furnish full time student verification or when they graduate, and are dropped automatically at age 24.

## ***Provider Information Seminars***

Representatives from your health, dental and vision plans will be available at the Retirement Services office on Tuesday, November 17, 2009, to answer retirees' plan-specific questions throughout the duration of the Health Fair. The Health Fair is scheduled from 10:00AM to 2:30PM in the Board Room located at 1737 North First Street, Suite 600, 6th Floor, San Jose, CA.

The following timeline shows the presentation times for each of the providers:

10:00 AM	Kaiser
10:30 AM	Delta Dental (PPO/PMI)
11:00 AM	Blue Shield of California
11:30 AM	UHC (PacifiCare/Secure Horizons)
12:00 Noon	Kaiser Permanente
12:30 PM	Prudential Long Term Care
1:30 PM	Blue Shield of California
2:00 PM	Social Security Admin.

## ***Managers & Supervisors Mentor Program***

The Managers & Supervisors Mentor Program has been developed by Retirement Services to provide pension plan information to the City Management/Supervisory Staff to enable them to better serve their staff as they navigate their careers with the City of San Jose.

An example of this would occur when it is necessary for an employee to be on extended medical leave. What are their options with regard to retirement: Are they able to file for a disability retirement? Was the medical condition caused by their work?

## ***FLU SHOTS—Why get vaccinated against the flu?***

Anyone can catch a flu virus. Most people will feel ill for a few days or more and suffer fever, sore throat, chills, fatigue and cough. Flu can lead to pneumonia and can be dangerous for people with heart or breathing conditions. Every year about 36,000 people die in the United States, mostly the elderly, from complications related to influenza. You can be infected by the influenza virus—but not feel ill—and pass the virus to your family friends and co-workers, or other people who have a high risk of complications or death from the flu.

Retirement Services has the Kaiser Permanente team scheduled to come to our Health Fair on November 17th from 10AM to 2PM to provide FREE "seasonal" flu shots to retirees. Even if you are not a Kaiser member, you can still get a FREE "seasonal" flu shot

This program is not intended to educate Managers and Supervisors to do the work of the Retirement Staff. The intent is only to give up-dated retirement information that will help direct active staff to Retirement Services and/or Deferred Compensation at critical times throughout their careers.

If you are interested in scheduling a time for Retirement and ING staff to come to your Department, please contact Karin Carmichael, Training analyst, at 794-1013 or [Karin.carmichael@sanjoseca.gov](mailto:Karin.carmichael@sanjoseca.gov).

## Retirements (sorted by Last Name)

Last Name	First Name	Position	Department	Retirement Date	Years
Abundiz	Ricardo	Custodian	Airport	12/20/2008	24.79
Acker	James E.	Fire Captain	Fire	6/27/2009	28.17
Agerbeek	Rudolf F.	Police Officer	Police	1/10/2009	29.56
Aguilar	David J.	Police Officer	Police	1/24/2009	25.20
Airhart	James M.	Sergeant	Police	1/4/2009	28.62
Alexander	Bruce D.	Police Officer	Police	1/10/2009	26.60
Alfaro	Angela T.	Recreation Supervisor	PRNS	3/21/2009	32.20
Allen	Ernestine M.	Rec Program Specialist	PRNS	3/21/2009	29.92
Allyn	Karen M.	Battalion Chief	Fire	6/27/2009	28.03
Aragon	Terry	Sr Office Specialist	Police	3/21/2009	28.00
Atkins	James J.	Plant Mechanic Supervisor	Env Services	9/5/2009	30.02
Avila	Jose G.	Fire Engineer	Fire	1/24/2009	28.82
Ayala	Michael A.	Battalion Chief	Fire	6/27/2009	28.07
Backman	Donna A.	Police Officer	Police	3/14/2009	19.20
Banuelos	Wilfredo	Fire Engineer	Fire	6/27/2009	29.09
Barnes	Steven D.	Sergeant	Police	1/24/2009	25.96
Bartels	Donald C.	Sergeant	Police	1/24/2009	30.00
Bennett	Joy C.	Police Data Specialist	Police	9/5/2009	30.04
Berry	Charles E.	Analyst II	Env Services	3/21/2009	36.36
Biebel	Philip	Sergeant	Police	1/24/2009	28.61
Bogart	Deborah L.	Assoc Env Svcs Spec	Env Services	3/21/2009	25.87
Borsi	John L.	Fire Engineer	Fire	1/25/2009	36.26
Boyd	Patrick E.	Sergeant	Police	1/24/2009	28.33
Boyd	Kathryn L.	Librarian II	Library	8/22/2009	34.89
Brinkley	Ola L.	Administrative Assistant	Fire	3/21/2009	25.00
Britton	Robert G.	Fire Engineer	Fire	1/24/2009	27.39
Bunnell	Mark	Heavy Diesel Equip Operator Mechanic	Env Services	2/7/2009	30.14
Burnham	Peter L.	Sr Constr Inspector	Public Works	6/27/2009	30.13
Buzzetta	Jerry T.	Battalion Chief	Fire	6/30/2009	25.00
Calderon	Richard I.	Police Captain	Police	12/27/2009	30.24
Campos	Michele Y.	Sr Planner	PBCE	2/21/2009	30.45
Carrillo	Tony	Firefighter	Fire	1/24/2009	28.84
Carruth	Enrique A.	Arson Investigator	Fire	1/24/2009	27.73
Castillo	Angelita C.	Sr Account clerk	Public Works	3/28/2009	28.55
Castro	Vilma S.	Sr Account Clerk	Public Works	6/27/2009	6.44
Chacon	Wesley J.	Fire Captain	Fire	1/26/2009	27.89
Clet	Jeffrey L.	Battalion Chief	Fire	6/27/2009	26.05
Coco	Richard C.	Acting Division Mgr	Public Works	6/27/2009	30.01
Conrad	Mark C.	Sergeant	Police	1/24/2009	28.59
Conry	Thomas J.	Fire Captain	Fire	12/27/2008	29.56
Coria	Jess A.	Fire Engineer	Fire	1/24/2009	27.00
Creal	Keith A.	Maintenance Supvr	Env Services	4/18/2009	24.33
Crescini	Lorelei	Messenger Clerk	Police	8/24/2008	16.71
Croyle	Philip	Battalion chief	Fire	1/24/2009	33.95
Cruz	Dante	Fire Captain	Fire	1/24/2009	27.79
Cruz	Marta A.	Sr Office Specialist	Transportation	3/7/2009	28.60
Delgado	Marley S.	Code Enf Inspector II	PBCE	10/27/2008	17.03
Demers	Philip J.	Fire Captain	Fire	6/27/2009	31.62
Dionne	Lawrence E.	Sr Constr Inspector	Public Works	7/1/2009	10.98
Donald	John S.	Fire Engineer	Fire	1/24/2009	31.51
Dovalina	Gilbert L.	Park Facility Supervisor	PRNS	5/30/2009	5.24
Drake	Gary W.	Sergeant	Police	6/24/2009	30.10
Dudding, Jr.	William L.	Police Officer	Police	9/19/2009	29.26
Dunn	Michael J.	Chief of Surveys	Public Works	3/21/2009	28.76
Eaton	Danny N.	Firefighter	Department	1/24/2009	28.84

Retirements (sorted by Last Name)					
Last Name	First Name	Position	Department	Retirement Date	Years
English	Mark R.	Fire Captain	Fire	6/27/2009	27.80
Erwin	Deborah K.	Sr Librarian	Library	8/22/2009	15.57
Escobar	Denise	Police Officer	Police	1/10/2009	28.30
Espinoza	Ricky M.	Maintenance Worker I	Transportation	5/7/2009	26.77
Facchino	Margaret K.	Sr Account Clerk	Finance	3/21/2009	27.71
Farbakhsh	Ardavan	Sr Constr Inspector	Public Works	3/21/2009	30.05
Farnsworth	Catherine V.	Program Manager II	Airport	9/5/2009	12.84
Fields	Michael D.	Fire Engineer	Fire	1/24/2009	27.41
Fino	Daniel H.	Police Officer	Police	6/19/2009	28.33
Flemate	Anna B.	Accounting Technician	Finance	3/21/2009	30.53
Galea	Andrew F.	Deputy Chief	Police	8/8/2009	30.85
Gallardo	Daniel J.	Fire Engineer	Fire	6/28/2009	25.02
Garcia	Sandra A.	Library Assistant	Library	3/21/2009	20.10
Gianatasio	Thomas A.	Fire Captain	Fire	1/24/2009	36.12
Gonzales	Raymond E.	Sergeant	Police	7/11/2009	28.46
Gonzalez	Rudy	Fire Engineer	Fire	6/13/2009	31.86
Gracie	Steven J.	Sergeant	Police	9/3/2009	20.95
Guerreiro	Doris E.	Contr Comp Specialist	Public Works	7/25/2009	23.67
Haase	Stephen M.	Director	PBCE	3/30/2009	3.94
Hall	Timothy R.	Firefighter	Fire	6/27/2009	29.97
Harding	Elizabeth	Parks Maint Repair Worker II	PRNS	9/5/2009	30.02
Hamane	Gregory S.	Fire Engineer	Fire	6/27/2009	26.07
Hayes	Alice L.	Office Specialist II	Env Services	3/21/2009	21.54
Hemminger	Pamela	Publ Safety Dispatcher	Police	5/1/2009	12.30
Hernandez	Irma E.	Police Data Spec II	Police	8/22/2009	30.01
Hildebrandt	Karen L.	Sergeant	Police	1/24/2009	28.00
Hill	Sandra E.	Police Data Specialist II	Police	5/16/2009	30.02
Himmel	Ned A.	Asst Library Director	Library	8/22/2009	8.70
Hirano	James M.	Arson Investigator	Fire	1/24/2009	26.50
Hodges	John M.	Fire Engineer	Fire	1/24/2009	27.70
Hoenisch	Martin E.	Fire Captain	Fire	1/24/2009	25.66
Imamura	Bradley K.	Real Property Agent II	Public Works	3/28/2009	23.66
Inami	Steven C.	Police Officer	Police	3/4/2009	20.03
Isa	Elizabeth S.	Admin Assistant	PBCE	5/30/2009	23.10
Izadyar	Paul	Associate Engineer	Public works	3/21/2009	23.78
Johnson	Craig	Police Officer	Police	7/11/2009	30.77
Johnson	Carolyn F.	Recreation Supervisor	PRNS	3/21/2009	31.02
Juelson	Robert M.	Fire Captain	Fire	1/24/2009	38.31
Kaisaki	Lois T.	Office Specialist II	Airport	9/5/2009	21.00
Kang	Hsiu-Wei S.	Librarian II	Library	8/22/2009	12.28
Kelley	Reginald J.	Plant Operator	Env Services	5/31/2009	29.78
Kelpler, Jr.	Gerald L.	Police Officer	Police	1/24/2009	29.36
Kennedy	Paul S.	Fire Engineer	Fire	1/24/2009	28.45
King	Paul J.	Fire Captain	Fire	1/24/2009	36.28
Kneis	Brian C.	Sergeant	Police	8/8/2009	29.14
LaDuc	Jean	Horticulturist	Env Services	7/25/2009	19.18
Larson	Randall D.	Sr Public Safety Disp	Fire	7/25/2009	19.01
Laurent	John R.	Fire Captain	Fire	1/24/2009	33.97
Layne	Andrew C.	Police Officer	Police	1/10/2009	23.75
Lee-Harold	Doris M.	Police Officer	Police	1/24/2009	20.61
Leong	Kenneth J.	Sergeant	Police	1/24/2009	26.93
Lerma	David C.	Fire Captain	Fire	6/27/2009	28.84
Leung	Julita K.	Accountant II	Finance	3/21/2009	21.34
Lim	Manuel V.	Assoc Engineer Tech	Env Services	3/21/2009	27.31
Lindeman	Gerald R.	Bldg Maint Super	Airport	7/25/2009	11.61

Retirements (sorted by Last Name)					
Last Name	First Name	Position	Department	Retirement Date	Years
Lloyd	Patricia	Sr Office Specialist	Police	2/21/2009	23.18
Lopez-Inami	Francine M.	Supv Police Data Spec	Police	8/22/2009	30.02
Lou	Terry G.	Sup Public Safety Dispatcher	Police	3/19/2009	19.32
Lovecchio	Peter H.	Police Officer	Police	1/24/2009	28.69
Lowe	Patricia A.	Sr Supv Administration	PBCE	3/7/2009	27.16
Lucchesi	George J.	Fire Captain	Fire	1/24/2009	32.70
Luna	Ramon O.	Fire Engineer	Fire	6/27/2009	24.96
Machado	Irene	Sr Office Specialist	General Services	4/22/2009	20.65
Malek	Mansour	Assoc Civil Engineer	Transportation	4/25/2009	23.47
Males	Jan L.	Sergeant	Police	1/24/2009	27.23
Marsh	Scott E.	Sergeant	Police	8/8/2009	28.54
Martin	Denise G.	Pub Safety Comm Spec	Police	8/13/2009	18.44
Martinez	Joe H.	Supervisor	Transportation	5/30/2009	28.59
Martone	Robert J.	Fire Captain	Fire	1/24/2009	32.73
Martuscelli	Thomas A.	Police Officer	Police	6/27/2009	25.32
McClendon	Tess	Accounting Technician	PBCE	3/31/2009	15.69
McIninch	Mark L.	Lieutenant	Police	1/24/2009	26.97
Melo	James A.	Lieutenant	Police	7/12/2009	25.02
Mendizabal	Michael J.	Principal Constr Insp	Public Works	3/7/2009	30.03
Metzger	Neil R.	Waste Water Operator	Env Services	3/31/2009	29.92
Meydbray	Arnold G.	Civil Engineer II	Public Works	3/21/2009	22.92
Mihara	Suzanne K.	Assoc Civil Engineer	Public Works	3/21/2009	21.73
Millan	Ruben A.	Firefighter	Fire	6/30/2009	28.88
Miller	Timothy I.	Fire Engineer	Fire	1/24/2009	32.60
Miller	Judy P.	Office Specialist II	Airport	7/25/2009	9.20
Miranda	Carlos	Police Captain	Police	1/24/2009	27.98
Mitchem	Judith D.	Sr. Office specialist	PRNS	5/30/2009	17.83
Mitic	Rebecca J.	Pub Safety Radio Disp	Police	6/11/2009	12.41
Montano	Wilfredo J.	Lieutenant	Police	1/24/2009	27.73
Montuy	Mike	Fire Engineer	Fire	1/24/2009	28.84
Morrison	Elizabeth S.	SR Analyst	Human Resources	6/27/2009	1.49
Nasiatka	William	Latent Fingerprint Examiner Supv	Police	3/31/2009	30.02
Naughten	Robert J.	Fire Captain	Fire	1/24/2009	25.69
Noble	Catherine P.	Gerontology Specialist	PRNS	9/5/2009	13.00
Nodal	Laura D.	Police Data Specialist II	Police	3/21/2009	27.70
Norling	David E.	Police Officer	Police	1/25/2009	26.93
Ojeda	Anthony J.	Firefighter	Fire	6/27/2009	29.22
Overstreet	William D.	Fac Light & Sound Tech	Conv, Arts & Ent	7/25/2009	31.72
Padilla	Rolando	Sr Constr Inspector	Public Works	3/21/2009	32.26
Pao	Sharon H.	Librarian II	Library	9/5/2009	16.06
Pardun	Lyle M.	Env Inspector	PBCE	5/3/2009	29.12
Parker	Gwen C.	Gerontology Supv	PRNS	3/31/2009	15.29
Pennington	Kirk W.	Electrical Maint Super	Transportation	3/21/2009	22.67
Phillips, Jr.	Eugene R.	Lieutenant	Police	1/24/2009	26.96
Pignone	Martha E.	Program Manager II	General Svcs	8/22/2009	19.03
Pomerantz	Ronald E.	Fire Captain	Fire	6/27/2009	29.24
Pomerleau	Peter E.	Police Officer	Police	1/24/2009	28.00
Powell	Edward L.	Fire Engineer	Fire	1/24/2009	28.00
Pringle	Karl D.	Police Officer	Police	1/10/2009	27.95
Ramirez	Lilian S.	Financial Analyst	Airport	3/1/2009	28.18
Ramos	Shirley J.	Custodian	General Svcs	3/7/2009	11.40
Reed	Dana C.	Deputy Fire chief	Fire	6/27/2009	28.16
Reyes	Juan M.	Police Officer	Police	8/6/2009	21.26
Rice	Charles H.	Fire engineer	Fire	6/27/2009	28.84
Roberts	Esther Mae	Sr Office Specialist	General Svcs	2/21/2009	18.78

## Retirements (sorted by Last Name)

Last Name	First Name	Position	Department	Retirement Date	Years
Robles	Vivian	Assoc Eng Technician	Airport	7/11/2009	30.02
Roderick	Michael G.	Sr. maintenance Wrkr	Transportation	8/8/2009	25.04
Rogers	Lorrie M.	Sergeant	Police	5/16/2009	28.08
Roush	James	Police Officer	Police	1/15/2009	18.50
Saiidnia	Habibollah	Sr Civil Engineer	Public Works	6/27/2009	21.38
Sakai-McClure	Susan T.	Supv Public Safety Disp	Fire	7/11/2009	18.96
Salas	Tina Marie	Maintenance Wkr II	Transportation	7/25/2009	30.60
Santiago	David J.	Police Officer	Police	1/24/2009	28.00
Schefski	Monica L.	Office Specialist II	Env Services	6/19/2009	9.90
Schnutenhaus	Thomas P.	Police Officer	Police	1/24/2009	29.29
Schoonover	David E.	Deputy Fire Chief	Fire	6/27/2009	27.82
Schroeder	Alan R.	Maintenance Supvr	Transportation	3/21/2009	30.14
Schwinge	Craig G.	Fire Captain	Fire	6/27/2009	26.02
Seminatore	David A.	Police Officer	Police	1/15/2009	20.70
Silva	Adelino R.	Fire Engineer	Fire	1/24/2009	28.47
Silva	Jose S.	Env Inspector II	Env Services	8/8/2009	28.26
Simpson	Terrence C.	Sergeant	Police	1/23/2009	29.29
Siqueiros	Gilbert	Fire Engineer	Fire	1/24/2009	28.46
Slocum	Hannah R.	Supv Librarian	Library	7/11/2009	20.54
Smith	Steven L.	Fire Captain	Fire	6/30/2009	25.01
Smith, Jr.	Jerome G.	Lieutenant	Police	1/24/2009	28.00
Smith, Jr.	Rodger B.	Firefighter	Fire	1/25/2009	29.55
Springer	George J.	Police Officer	Police	7/11/2009	28.46
Stapp	Dan R.	Fire Captain	Fire	1/24/2009	27.75
Stone	Kenneth A.	Sr Investigator Collector	Finance	2/7/2009	20.92
Storms	Ray H.	Fire Captain	Fire	6/30/2009	25.07
Stowell	David M.	Plant Operator	Env Services	3/22/2009	26.34
Strand	Robert	Sr Sys App Programmer	Information Tech	6/27/2009	26.96
Sutton	Joan	Fire Inspector	Fire	1/15/2009	17.49
Tapia	Cruz	Fire Engineer	Fire	1/10/2009	41.70
Tengson	Isagani C.	Investigator-Collector II	Finance	7/25/2009	17.85
Terrasas	John L.	Plant Shift Supvr	Env Services	3/21/2009	25.36
Thoman	Mark A.	Firefighter	Fire	6/27/2009	26.10
Tobin	Mary M.	Library Clerk	Library	2/7/2009	29.38
Tovar	Adam D.	Police Officer	Police	7/12/2009	28.23
Unger	Bruce W.	Lieutenant	Police	7/11/2009	29.29
Valenzuela	Richard J.	Firefighter	Fire	1/25/2009	27.73
Vallecilla	Ernesto J.	Sergeant	Police	1/24/2009	28.84
Van Keuren	Neal P.	Env Services Specialist	Env Services	3/21/2009	21.21
Videan	Edward N.	Police Officer	Police	8/22/2009	20.03
Walsh	Neil J.	Plant Mechanic	Env Services	3/21/2009	22.44
Warren	Thomas L.	Fire Engineer	Fire	6/30/2009	25.02
Warvi	Oiva J.	Security Officer	Conv, Arts & Ent	6/27/2009	19.84
Weber	Jeffrey B.	Arson Investigator	Fire	1/10/2009	27.71
Weekley	Gary L.	Battalion Chief	Fire	1/10/2009	27.39
Westrup	Thomas M.	Fire Captain	Fire	1/24/2009	29.53
Wheeler	Leland R.	Sr. Plant mechanic	Env Services	8/8/2009	30.01
White	Douglas F.	Police Officer	Police	1/10/2009	27.97
Wiley	Bruce M.	Sergeant	Police	9/19/2009	28.97
Windisch	Stephen R.	Sergeant	Police	9/19/2009	30.02
Wing	Karen H.	Division Manager	Housing	3/28/2009	12.34
Wing	Steven T.	Sr Analyst	Public Works	3/28/2009	20.54
Wong	King C.	Associate Engineer	PBCE	3/21/2009	23.80
Wright	Timothy M.	Sr Constr Inspector	Transportation	5/2/2009	30.04
Zibert	Ami	Pub Safety Disp II	Police	1/16/2008	10.89

## Stuart Bennett

### Investment Officer



Stuart has recently joined our team and his initial activities will focus on the actuarial valuations for the San Jose Federated Employees Retirement System and the San Jose Police and

Fire Department Pension Plan, and a variety of quantitative projects and risk control studies related to the investment portfolios for the two pension plans.

Stuart holds a Bachelor of Science degree from University College, Dublin, Ireland,

and is currently pursuing the Chartered Financial Analyst designation from the CFA Institute. He is an Associate of the Society of Actuaries, a Member of the American Academy of Actuaries and a Fellow of the Conference of Consulting Actuaries. He reports to Carmen Racy-Choy, Deputy Director, Chief Investment Officer.

For the last seven years, Stuart served the California Public Employees' Retirement System as an Associate Pension Actuary where he was responsible for determining liabilities and contribution requirements for over 200 public agency pension plans. With over twelve years of experience working with public sector defined benefit plans in California, Stuart is a valuable addition to the Department.

## Tom Alston

### Staff Specialist

We welcome our new Part-Time Staff Specialist, Tom Alston. Tom will be working for the Benefits Division. Tom holds a B.A. in English from UC, Berkeley and a J.D. from the McGeorge School of Law.

In the past, Tom has served with the San Jose City Attorney's Office as a Deputy City Attorney responsible for the defense of Worker's Compensation actions and third party subrogations.

Prior to his position in the City Attorney's Office, Tom worked as Staff Counsel with the Allstate Insurance Company in San Jose and

as an Associate Counsel with Gibbons, Lees, and Edrington in Walnut Creek.

We welcome Tom's knowledge and appreciate having his expertise available to our Department and staff.





## ***Learn to Plan for your Retirement***

Retirement Services Department provides a number of Brown Bag classes throughout the year. These are on topics such as *“Buying a Home”*, *“Selling a Home”*, *“How to Invest \$25 a Paycheck”*, *“Creating and Managing Wills & Trusts”*, *“Estate Planning: Understanding the Basics”*, *“Investing for the Clueless”*, *“Planning for Financial Transitions”* and many more.

These classes are presented by Financial Knowledge Network (FKN), a nationwide leading provider of on-site employee financial education courses. They continually search

for recent developments to provide the most up-to-date information in each course and present on an “education only” basis, selling no product or service. Participants gain information, knowledge and skills to make educated financial decisions.

Flyers for these classes are distributed with payroll electronically through the City Manager’s Office. Remember to watch for topics of interest and take advantage of this great opportunity!

Please fax your registration to 392-6732 or email it to : [retire.classes@sanjoseca.gov](mailto:retire.classes@sanjoseca.gov).

<b>Brown Bag Schedule of Classes</b>			
<b>Date</b>	<b>Active</b>	<b>Topic</b>	<b>Location</b>
Oct. 13, 2009 @ 11:00 AM	Active	Managing Investment Portfolio	200 E. Santa Clara St.
Nov. 3, 2009 @ 11:00 AM	Active	Understanding Mortgages & How to Qualify	200 E. Santa Clara St.
Dec. 1, 2009 @ 11:00 AM	Active	Tax Planning for 2008 & Beyond	200 E. Santa Clara St.
<b>Date</b>	<b>Retiree</b>	<b>Topic</b>	<b>Location</b>
Oct. 20, 2009 @ 11:00 AM	Retiree	Creating and Managing Wills & Trusts	Retirement Svcs.
Nov. 10, 2009 @ 11:00 AM	Retiree	Executor, Beneficiary & Other Important Estate Planning Decisions	Retirement Svcs.
Dec. 08, 2009 @ 11:00 AM	Retiree	Estate Planning: Understanding the Basics	Retirement Svcs.

<b>Upcoming Board Meetings</b>	
<b>At 1737 North First Street Suite 600</b>	
<b>Starting At 8:30 AM</b>	
<b>Board</b>	<b>Date</b>
Police and Fire	November 05, 2009
Federated	November 12, 2009
Police and Fire	December 03, 2009
Federated	December 10, 2009

## ***Provider Information—Available Physicians, Facilities and Plan Service Areas***

Retirement Services has a limited supply of directories to help you identify available providers, facilities and service areas for our respective plans. However, note that these tend to be out-of-date the moment they are printed. Please contact the plan provider directly to get the most up-to-date information on plan service areas and their networks of available physicians and facilities.

Health Plan	Group Number	Member Services	Internet Address
<b>Non-Medicare Plans (Under Age 65)</b>			
Blue Shield HMO	H11756	1-800-837-4481	<a href="http://www.blueshieldca.com">www.blueshieldca.com</a>
Blue Shield PPO	975567	1-800-837-4481	<a href="http://www.blueshieldca.com">www.blueshieldca.com</a>
Blue Shield POS	MH0161	1-800-837-4481	<a href="http://www.blueshieldca.com">www.blueshieldca.com</a>
Kaiser Permanente – Northern CA	887-21	1-800-464-4000	<a href="http://www.my.kp.org/ca/csjetirees/">www.my.kp.org/ca/csjetirees/</a>
Kaiser Permanente – Southern CA	230179	1-800-464-4000	<a href="http://www.my.kp.org/ca/csjetirees/">www.my.kp.org/ca/csjetirees/</a>
<b>Medicare Plans</b>			
Kaiser Senior Advantage (HMO)	887-21	1-800-443-0815	<a href="http://www.my.kp.org/ca/csjetirees/">www.my.kp.org/ca/csjetirees/</a>
Kaiser Medicare Out of Area (HMO)	887-21	1-800-464-4000	<a href="http://www.my.kp.org/ca/csjetirees/">www.my.kp.org/ca/csjetirees/</a>
KPSA Southern CA (HMO)	230179	1-800-464-4000	<a href="http://www.my.kp.org/ca/csjetirees/">www.my.kp.org/ca/csjetirees/</a>
AARP MedicareComplete (Secure Horizons) (HMO)	140309 (FED) 140298 (P&F)	1-888-736-7440	<a href="http://www.securehorizons.com">www.securehorizons.com</a>
Blue Shield Medicare-HMO	H11336	1-800-837-4481	<a href="http://www.blueshieldca.com">www.blueshieldca.com</a>
Blue Shield Medicare-PPO	975568	1-800-837-4481	<a href="http://www.blueshieldca.com">www.blueshieldca.com</a>
PacifiCare Sr. Supplement Plan F	00010564	1-800-591-9911	<a href="http://www.securehorizons.com">www.securehorizons.com</a>
<b>Dental Plans</b>			
Delta Dental (PPO)	2584-7001	1-800-423-8154	<a href="http://www.deltadentalca.org">www.deltadentalca.org</a>
DeltaCare (PMI)	5643	1-800-422-4234	<a href="http://www.deltadentalca.org/pmi">www.deltadentalca.org/pmi</a>
<b>Vision Plans</b>			
Vision Service Plan (VSP)	12112926-01	1-800-877-7195	<a href="http://www.vsp.com">www.vsp.com</a>
EyeMed Vision Care	9681594 (FED) 9681602 (P&F)	1-866-723-0514	<a href="http://www.eyemedvisioncare.com">www.eyemedvisioncare.com</a>
EyeMed Vision Care Materials Only	9721135 (FED) 9721143 (P&F)	1-866-723-0514	<a href="http://www.eyemedvisioncare.com">www.eyemedvisioncare.com</a>

## ***Prepare For Retirement***

Retirement Services provides the CHOICES program to active employees 1-5 years from retirement. Its purpose is to educate the employees of their City pension benefits as well as all other areas of preparing for retirement. The seven week series includes topics such as:

- Presentation by Social Security
- Investing in Your Health 101
- Deferred Compensation Illustrations

- Retirement Benefits and Options
- Health, Dental and Other Optional Insurance Options in Retirement

These classes are offered twice each year in the Spring (Jan-Mar) and the Fall (Sept-Nov). If you are interested, please contact Karin-Carmichael at 794-1013 or [Karin.carmichael@sanjoseca.gov](mailto:Karin.carmichael@sanjoseca.gov).

## In Memory (sorted by last name)

Last Name	First Name	Department	Retired	Passed Away
Aligo	James	Police	3/7/1996	11/24/2008
Bishop	Leona	PRNS	9/13/2004	3/27/2009
Black	Donald R.	Police	3/3/2001	6/5/2009
Bolton	Hilbert	Fire	7/12/1977	5/15/2009
Brager	Tony J.	Public Works	4/1/1978	3/29/2009
Bravo-Carney	Delia J.	Police	Active	11/21/2008
Cahill	John F.	Police	Active	12/4/2008
Carlitz	Joseph H.	Neighborhood Maintenance	1/19/1985	2/14/2009
Cheng	Tyrone F.	PRNS	Active	4/22/2009
Davilla	Richard S.	Airport	6/5/1993	2/14/2009
Dorr	Donald R.	Fire	5/13/1980	3/11/2009
Favorite	Lawrence R.	Fire	6/12/1974	12/7/2008
Fuller	Judy M.	City Council	9/20/2008	12/30/2008
Gier	Floyd L.	Neighborhood Maintenance	1/7/1990	3/12/2009
Gill	Charles D.	Neighborhood Preservation	7/31/2001	6/25/2009
Goff	Frances A.	Police	5/31/1997	5/20/2009
Harness	Kenneth D.	Communications	8/3/1985	2/9/2009
Hass	Albert H.	General Services	1/27/1996	3/29/2009
Higa	James M.	General Services	9/8/2005	6/11/2009
Hilson	Clyde	Finance	11/7/1992	6/26/2009
Holmes	James P.	Fire	11/19/2004	3/12/2009
Hubbard	Gary	Public Works	3/31/2007	5/1/2009
Jacklich	Robert J.	Neighborhood Maintenance	6/29/1985	5/12/2009
Kamimori	Sue E.	Finance	7/3/2004	10/24/2008
Kleiner	Richard I.	Police	3/19/1996	1/16/2009
Knell	Richard K.	Police	1/13/1990	5/3/2009
Kyle	Geraldine V.	Personnel	11/8/1986	6/8/2009
Lamarra	Anthony	PRNS	5/15/1976	6/29/2009
Lanch	Kenneth D.	Police	8/6/1985	12/27/2008
Leabres, Jr.	Demetrio	Public Works	10/23/2004	7/7/2009
Lotz	Natalie I.	Culture Convention	7/3/1993	3/23/2009
Lucchesi	John P.	PBCE	1/6/1979	4/16/2009
Marianelli	Angie M.	Fire	2/18/1978	3/9/2009
Mestaz	Christopher P.	General Services	10/11/2003	11/15/2008
Miller	Esther F.	Public Works	1/10/1981	4/16/2009
Moldenhauer	Peggy	Airport	3/2/1985	5/31/2009
Moore	Ann C.	Police	1/5/1982	12/9/2008
Mora	Manuel C.	Airport	5/11/1989	4/26/2009
Nagareda	Amy L.	Police	7/20/1991	5/30/2009
Negovan	Albert L.	General Services	1/27/1996	12/17/2008
Nocholas	Phillip	PRNS	10/5/1985	5/18/2009
Papa	Phyllis P.	Police	10/17/1987	4/3/2009
Polk	Sharon-Rae M.	Information Systems	6/14/1999	4/4/2009
Prestigiacomio	George F.	General Services	10/9/1982	1/19/2009
Saczynski	Edwin E.	Public Works	10/24/1992	4/18/2009
Sellarole	Regina C.	Police	1/24/1976	4/9/2009
Smith	Lois M.	Personnel	10/13/1979	4/15/2009
Stainbrook	Mildred O.	Library	7/9/1989	6/9/2009
Struss	Rosemary E.	City Attorney	10/4/1987	6/17/2009
Tibbs	Minnie M.	Fire	12/8/1979	10/17/2008
Tuttleman	Verna	Manager	2/25/1984	12/21/2008
Warner	Maurice J.	Police	1/11/1998	5/5/2009
Zamora	Mike	Transportation	4/9/2005	4/20/2009
Zotta	Paul D.	PRNS	7/3/1992	3/27/2009