



STATE OF WISCONSIN  
Department of Employee Trust Funds  
David A Stella, Secretary

801 W Badger Road  
PO Box 7931  
Madison WI 53707-7931

1-877-533-5020 (toll free)  
Fax (608) 267-4549  
<http://etf.wi.gov>

## **CORRESPONDENCE MEMORANDUM**

**DATE:** February 11, 2010  
**TO:** Wisconsin Deferred Compensation Board  
**FROM:** Shelly Schueller, Director  
Wisconsin Deferred Compensation Program  
**SUBJECT:** March 2, 2010, Board Meeting Miscellaneous Items

The following items are included with the Board materials for March 2, 2010:

### **Wisconsin Deferred Compensation Program Information**

a) WDC *MoneyTalks* Newsletter: January 2010

### **Investment Product Information**

- b) Galliard: New format for quarterly report. Sample with Third Quarter 2009 data
- c) Schwab: PCRA Report – Fourth Quarter 2009
- d) Schwab: Schwab Lowers Equity Trade Pricing to \$8.95 as of January 19, 2010

### **Reports**

- e) Selected 2009 WDC Quarterly Statistics
- f) Quarterly Plan Status – Fourth Quarter 2009
- g) Performance Standards Report – Fourth Quarter 2009
- h) Local Employer Elections - Fourth Quarter 2009
- i) Financial Emergency Withdrawal Report through January 28, 2010

### **Media Articles**

- j) *PlanSponsor.com*: January 25, 2010 “Study Says Investment “Help” Makes a Difference”
- k) *Morningstar FundSpy*: January 21, 2010 “ How Vanguard Found Itself on Top in the ‘Lost Decade’”
- l) *Milwaukee JournalSentinel*: January 20, 2010 “M&I Reports 5th Straight Quarterly Loss”
- m) *P&I Online*: January 20, 2010 “Lawson to leave Fidelity president’s post”
- n) *Morningstar* (Katie Ruskewicz): January 2010 FundInvestor pps. 4-5 “American Funds EuroPacific Growth: Morningstar Fund Analyst Pick”
- o) *Morningstar* (Karen Dolan): January 2010 FundInvestor pps. 8-9 “Announcing Morningstar Fund Managers of the Year – Morningstar Research”
- p) *Morningstar* (Mike Breen): January 2010 FundInvestor p. 11 “A Steep Price for No Growth – Red Flags”
- q) *PlanSponsor.com*: December 16, 2009 “Senator Says Target-Date Legislation Coming”