



STATE OF WISCONSIN  
Department of Employee Trust Funds  
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SECRETARY

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**CORRESPONDENCE MEMORANDUM**

**DATE:** October 16, 2014  
**TO:** Wisconsin Deferred Compensation Board  
**FROM:** Shelly Schueller, Director  
Wisconsin Deferred Compensation Program  
**SUBJECT:** Operational Updates

The following items are included with the Board materials for November 4, 2014:

**Wisconsin Deferred Compensation Program Information**

- a. Financial Statements Audit Report December 31, 2013 and 2012
- b. Great-West Financial
  1. Charles Nelson press letter re: Great-West, J.P. Morgan and Putnam Investments
- c. WDC *MoneyTalks* newsletter: July 2014 and October 2014

**Investment Provider Information**

- d. Galliard
  1. Second Quarter 2014 Portfolio Update
  2. July 29, 2014 Mike Norman email regarding SEC approval of money market reform
- e. Schwab: PCRA Report – Second and Third Quarter 2014

**Plan Reports**

- f. Selected Quarterly 2014 WDC Statistics (including hardship withdrawals)
- g. Performance Standards Report – Second Quarter 2014
- h. Plan Review Report – Second Quarter 2014
- i. Local Employer Elections – Second and Third Quarter 2014

**Media Articles**

- j. O'Donnell, Carl. "Abigail Johnson Replaces Father Edward as CEO of Fidelity." *Forbes*. October 13, 2014.
- k. *Pensions and Investments* "Great-West appoints president to oversee larger retirement business." September 10, 2014.
- l. Russ, M. "Shocker: Gross Goes to Janus." *Morningstar FundInvestor*. September 26, 2014
- m. Longstreth, Andrew. "US. Supreme Court to hear Libor antitrust appeal." *Reuters*. June 30, 2014
- n. Kerrigan, Heather. "An Effortless Way to Save for Retirement." *Governing Management*. June 19, 2014.

Board	Mtg Date	Item #
DC	11.4.14	12