

From: Schueller, Shelly - ETF

Sent: Wednesday, May 23, 2018 9:10 AM

To: 'jonrbergquist@hotmail.com' <jonrbergquist@hotmail.com>

Cc: 'wdcprogram' <wdcprogram@empower-retirement.com>; Emily Lockwood (emily.lockwood@empower-retirement.com) <emily.lockwood@empower-retirement.com>

Subject: RE: Contact information for the Wisconsin Deferred Compensation Board Members

Hello Mr. Bergquist –

Your recent email to the ETF Public Records Request email address was shared with me for a response, as I work directly with the board overseeing the Wisconsin Deferred Compensation Program. ETF has posted information on how to contact all the Boards on the respective governing boards' pages of the ETF website. For the Deferred Compensation Board, that page is http://etf.wi.gov/boards/board_dc.htm. Here is the information on board correspondence:

“Individuals can send correspondence to the Deferred Compensation Board by sending the correspondence by email to BoardFeedback@etf.wi.gov, or by U.S. postal mail to Board Liaison, P.O. Box 7931, Madison, WI 53707-7931. To help ensure correspondence is received by the board in time for the next scheduled meeting, please send it in a manner so that it is received by ETF at least twenty-four (24) hours prior to that meeting. All correspondence received by email will receive an auto-reply message confirming receipt of the correspondence by ETF.

The board will receive your correspondence unedited and unredacted. Subject to the Wisconsin Open Meetings Law, any consideration and discussion of the correspondence may occur at the board meeting.

Correspondence received by the board will be posted on the ETF website after it is reviewed for any redaction that might be necessary pursuant to applicable state or federal law. Absent specific, written authorization from the individual, ETF is prohibited from posting HIPAA protected health information on the ETF website. In addition, your correspondence may be subject to the Wisconsin Public Records Law.”

Mr. Bergquist, it is highly likely that an email directed to the Deferred Compensation Board will be shared with me as a first step toward resolving any issues. I am sorry to learn that we have not yet solved the problem of your two WDC accounts and have cc'd the WDC office and Emily Lockwood, our local director. I expect they will also contact you with an update on the status of a resolution to your access problems.

At the WDC, you have two accounts: one account as a public employee and a second as the beneficiary on your late wife's account. When we spoke about this earlier this month, you shared with me that you were using the same username for each one. This worked with the old WDC website as administered by Empower, but the new website (released in late March 2018) doesn't allow the same username for different accounts. The steps and solutions Empower tried while you were on the phone with them inadvertently resulted in turning off access to both accounts. As you know, Empower has a service request in to their IT/Systems folks to figure it out and will be contacting you when they have a solution or work around.

I will include your email to the ETF Public Records Request address and this response with the materials for the Board's June 14, 2018 meeting.

Thank you for your continued patience -
Shelly



Shelly Schueller | Director
Deferred Compensation
Wisconsin Department of Employee Trust Funds | etf.wi.gov
608 266-6611 | 877 533-5020



From: jon bergquist [<mailto:jonrbergquist@hotmail.com>]

Sent: Tuesday, May 22, 2018 10:27 AM

To: ETF SMB Public Records Request <publicrecordsrequest@etf.wi.gov>

Subject: Contact information for the Wisconsin Deferred Compensation Board Members

I have investments in the Wisconsin Deferred Compensation program and am having problems with getting correct information on the status of my 2 accounts with Empowered Retirement. Would you please send me the contact information for the current Board members of the Wisconsin Deferred Compensation program so I can contact the Board members about my problems getting correct information from Empower Retirement on my 2 accounts.

Thanks you

Jon R. Bergquist

220 2nd St

Amery, WI 54001

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