



## **457 DEFERRED COMPENSATION RETIREMENT PLAN COMMITTEE MEETING**

### **MINUTES**

**December 9, 2025**

Committee Members: Josh Fudge, Lorrie Lopez, Jennifer Whitener, Tim Keeton, Jeff Vanhook  
Innovest: Jared Martin, Kyli Soto, Troy Jensen  
TIAA: Richard Diodosio, Nate Setchfield, Debbie Buckner  
HR: Kathy Harris

Josh Fudge and Tim Keeton approved the 8/15/25 minutes.

Beneficiary Update- HR will be notifying those on the 457(b) and 401(a) plans if they do not have a beneficiary assigned and remind them to complete this on the TIAA website.

Retirement Advisor RFP- the contract with Innovest expires as of 7/1/26 for the 457(b), 401(a) and HRA plans. Jennifer will be working with the 401(a) board and the Purchasing Department on timing and making sure the RFPs issued are aligned from a content and timing standpoint. All members of the 457(b) committee will be on the RFP evaluation committee.

Communications about the new Roth catch-up contribution requirements for those aged 50+ with over \$150K in annual salary will be included in the next countywide Inside Information newsletter, and a follow-up targeted email will be sent to any employees on the 457(b) who fall into this group.

Innovest and TIAA covered their Q3 2025 reports. Innovest also completed a review of fiduciary responsibilities for the committee.

Tim Keeton announced that today is his last meeting on the committee, as he will no longer be with the County as of year-end.

The next meeting will be in-person in February- date TBD.