



**VENTURA COUNTY
DEFERRED COMPENSATION COMMITTEE
401(k) Shared Savings Plan**

ANACAPA CONFERENCE ROOM – Lower Plaza Level
Hall of Administration, Ventura County Government Center
800 S. Victoria Avenue, Ventura, CA 93009

Zoom Link: <https://www.zoomgov.com/j/1617172888>

**August 28, 2025
2:00 p.m.**

- 1. Public Comments**
- 2. Committee Member Comments**
- 3. Minutes of Regular Meeting – May 29, 2025**
- 4. Baker Tilly Annual Plan Audit Review**
- 5. SageView Advisory Group Q2 2025 Investment Review**
- 6. Fidelity Personalized Planning & Advice – Managed Account Update**
- 7. Fidelity Investments Quarterly Service Review**
- 8. SECURE 2.0 – Roth Catch-Up Requirement**
- 9. Excess Revenue Credit Account Rebate – Correction**
- 10. Information Agenda**

401(k) Participant Fee Account – Q2 2025
401(k) Excess Revenue Credit Account – Q2 2025
401(k) Hardship Withdrawals – Q2 2025
Fidelity Service Level Agreement Reporting – Q2 2025
Deferred Compensation Meeting Schedule for 2026

Electronic meeting packet available at: <https://dc.venturacounty.gov/deferred-compensation-committee/>

If any accommodations are needed, please contact the Safe Harbor program at 805-654-2620 or by email at:

Deferred.Compensation@venturacounty.gov.

Requests should be made as soon as possible but at least 48 hours prior to the scheduled meeting.



**VENTURA COUNTY
DEFERRED COMPENSATION COMMITTEE
Section 457(b) Plan**

ANACAPA CONFERENCE ROOM – Lower Plaza Level
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800 S. Victoria Avenue, Ventura, CA 93009

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- 9. Excess Revenue Credit Account Rebate - Correction**
- 10. Information Agenda**

457 Participant Fee Account – Q2 2025
457 Excess Revenue Credit Account – Q2 2025
457 Emergency Hardship Withdrawals – Q2 2025

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**VENTURA COUNTY
DEFERRED COMPENSATION COMMITTEE
SRP 457 Plan**

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- 5. Fidelity SRP 457 Savings Plan Review – Q2 2025**

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