



Local Service

Take advantage of **Voya Financial™** commitment to provide superior customer service to the City of Portland's Deferred Compensation Plan.

Our local service team in Portland has enjoyed working with the City of Portland employees for over 30 years. Our team of experienced financial professionals is available to assist you with a variety of services designed to help you plan for your retirement and future financial needs. Our services include enrollment meetings that highlight the benefits of the City of Portland Governmental 457(b) plan, educational meetings and seminars, and individual one-on-one meetings where we can address your specific situation and develop a plan to outline your financial needs and objectives.

Our investment, financial and retirement planning seminars and advice cover a variety of topics such as:

- Asset Allocation and Diversification
- College Funding
- Financial Focus for Women
- Mutual Fund Investing
- Reacting to a Changing Stock Market
- Retirement Income
- Year-End Tax Strategies
- Retirement Readiness

Our personal financial planning services include:

- A Financial Profile Retirement Planning Module provided to City employees with Voya™ accounts at no additional cost.
- Asset allocation snapshot of all assets using Morningstar Advisor Workstation provided to participants with Voya accounts at no additional cost.
- PERS counseling provided to participants with Voya accounts at no additional cost.

Investment advisory products and services are provided by Morningstar Associates, LLC ("Morningstar Associates"), a registered investment advisor and wholly-owned subsidiary of Morningstar, Inc. Voya and its companies in the U.S. are not affiliated with Morningstar Associates or its affiliates, and receive no fee or other direct financial benefits from Morningstar Associates in connection with the use of its services. The Morningstar name and trademarks are used under license from Morningstar Associates.

Conveniently located:

Local offices are conveniently located at 200 SW Market Street, Suite 1700 in downtown Portland. Our location makes it easy for City employees to meet with an Voya Financial Advisors registered representative.

Contact Us

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¹ Securities and investment advisory services offered through Voya Financial Advisors, member SIPC.

² Registered Representative of and securities offered through Voya Financial Advisors, member SIPC.

www.voyaretirementplans.com/custom/portland

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