How to enroll online

Enroll in the San Francisco Deferred Compensation Plan (SFDCP) today.

Learn more about the SFDCP
Visit SFDCP.org to learn about enrolling in the SFDCP, the investment options, plan features and highlights, participant resources and tools, and to contact your department dedicated SFDCP counselor.* Click My Account in the upper right corner to enroll in the SFDCP and also to log in to your account in the future as a SFDCP participant.

To enroll online
Click the Ready to Enroll? link to enroll in the SFDCP. You’ll need about 5-10 minutes to complete the enrollment process. Once you’ve enrolled, you will be mailed a password to access your new SDFDCP account online using the Log In box.

Start with some personal information
First, confirm that Plan Number 625015 is shown at the top of the page. Then complete the information requested. This includes providing your Social Security number, date of birth and zip code.

Tell us more about you
On this screen, you’ll need to provide information such as your name, home address, email address, annual salary, and the number of pay periods per year.
Set your savings goals
The information you’ll provide here will help estimate how ready you may be for retirement. You’ll need to provide the age you want to retire, how much of your income you’ll want to replace in retirement, and what you’ve already saved toward that goal.

Select an amount to save and investment option
Based on the information you’ve provided to this point, you’ll see an estimate of how much income you’ll be able to replace in retirement. Change the amount from your paycheck with the “-” and “+” buttons to see how saving more or less can affect your retirement goal.

Choose where to invest the contributions from your paycheck in the Select an investment option section. If you do not know which investment option to choose, you can select a SFDCP Target Date Fund, which the SFERS Retirement Board has chosen as the default investment option for the Plan.

To select a Target Date Fund in this section, go to Get There Myself > Typical Approach > Expand All Items to find the full list of investment options and choose a SFDCP Target Date Fund by the year closest to your estimated retirement age 65.

Name your beneficiary(ies)
Click Elect Now to begin the beneficiary election process with your marital status. If you’re married, your spouse must be at least 50% of your primary beneficiary. Complete the required information and click Submit.

If you’re married and want someone other than your spouse as primary beneficiary for more than 50%, click Elect Later. You and your spouse will need to complete, sign and submit a paper beneficiary form. You can find a Beneficiary Designation Form on the Participating in the SFDCP page at SFDCP.org.

Confirm your enrollment choices
Review and confirm the information you provided. This includes your personal and employment information, savings rate, investment choice, and beneficiary election.

You can also choose to set up an annual automatic increase. Click the check box, provide an increase start date, then set how much you want your contributions to increase by until you reach a total rate.

When you’re ready to enroll, check the acknowledgment box and click Enroll Now. Welcome to the San Francisco Deferred Compensation Plan!

IMPORTANT: The illustrations or other information generated by the calculators are hypothetical in nature, do not reflect actual investment results, and are not guarantees of future results. This information does not serve, either directly or indirectly, as legal, financial or tax advice and you should always consult a qualified professional legal, financial and/or tax advisor when making decisions related to your individual tax situation.

Questions?
Call us at 888-SFDCP-4U (888-733-2748) weekdays between 5 a.m. – 5 p.m., except on stock market holidays.

iPhone and iPod touch are trademarks of Apple Inc., registered in the U.S. and other countries. Android is a trademark of Google Inc. Amazon and Kindle are trademarks of Amazon.com, Inc. or its affiliates.
*Information from registered SFDCP counselors is for educational purposes only and is not legal, tax or investment advice. Local Plan Service Representatives are registered representatives of Voya Financial Advisors, Inc., member SIPC. Plan administrative services are provided by Voya Institutional Plan Services, LLC (VIPS). VIPS is a member of the Voya® family of companies.