



CELEBRATING 35 YEARS OF BUILDING RETIREMENT SECURITY

35TH
ANNIVERSARY
1972-2007





Joan McCallen, ICMA-RC President and CEO

“It is a privilege to lead this corporation, now in its 35th year. We at ICMA-RC are committed to helping state and local government workers build retirement security for a long time to come.”

Joan McCallen,
ICMA-RC President and CEO

1972

ICMA Retirement
Corporation founded

1974¹

Balanced Fund
introduced

1975

Bond Fund introduced

1979

Guaranteed Fund
introduced

35 YEARS AND STILL GOING STRONG

FROM THE VERY BEGINNING, ICMA-RC's mission has been to offer participants a way to build retirement security while simplifying retirement plan administration and education for employers.

These goals are evident first and foremost in our determination to offer our services to any public sector employer no matter the number of employees or the size of their plan.

We seek constantly to improve our communications links to plan sponsors and participants with clearer, more informative participant statements; with an easier-to-navigate Web site; and through our support for programs that promote retirement savings.

For 35 years, ICMA-RC has provided retirement plans exclusively for state and local governments. Working hand in hand with employers we help employees build retirement security. Assets under management and administration have grown significantly through the years, and steadily continue to do so. Our growth and client retention is testament

1980

Monthly contributions exceed \$1 million

1983¹

Growth Fund introduced

1986

Assets under administration exceed \$500 million

1988

Assets under administration exceed \$1 billion

CELEBRATING 35 YEARS OF BUIL

to our mission-driven philosophy. It is this unique characteristic that has, and will, continue to set the stage for many more years of retirement planning leadership in the public sector.

A History of Excellence

In 1972, ICMA-RC stepped into the retirement services industry, opening doors for the first time to a special group of people – state and local government employees.

International City/County Management Association (ICMA) leaders recognized that many of their members were retiring without the financial resources they needed after they left service.

The challenge showed itself most strongly among city and county managers who, because they routinely changed employers during their careers, were unable to build tenure with a single employer sufficient to reward them with a meaningful defined benefit pension.

ICMA leaders knew their members needed a new program, one that addressed this shortfall.

*ICMA leaders
knew their
members
needed a new
program...*

1991

Assets under
administration
exceed \$2 billion

1991

VantageTrust PLUS
Fund introduced

1995²

Introduced first
Vantagepoint
Model Portfolio Fund

1995

Launched Web site

ING RETIREMENT SECURITY

A grant from the Ford Foundation helped launch ICMA Retirement Corporation and the future of retirement savings in the public sector changed forever. With new portability features, ICMA-RC's deferred compensation retirement plans gave even the most mobile employee an opportunity to save for retirement in a portable plan.

A Pendant for Persistence

After far-reaching pension reform legislation was adopted by Congress in 2001, ICMA-RC worked to ensure that provisions benefiting public sector retirement savings plans, such as 457 portability and parity of contribution rates with the private sector, were included in the measure.

Last year, ICMA-RC worked with public sector leaders to ensure that the gains reached in the 2001 legislation were made permanent with the passage of the Pension Protection Act of 2006.

Last fall, ICMA-RC was a leader in establishing National Save for Retirement Week (NSRW), the first nationally endorsed program promoting retirement savings. Our efforts to make NSRW permanent continue.

ICMA-RC worked to ensure that provisions benefiting public sector retirement savings plans were included in the measure.

1996

Opened Account
Access to participants

1998

EZLink online
employer system
introduced

1999¹

Vantagepoint Funds
registered

1999

Vantagepoint IRA
program launched

Your Success is Our Success

Continuing our tradition of dedicated service to state and local employees, ICMA-RC initiated several important programs aimed at increased education and simplified planning process for participants.

*We added
Milestone
Funds to the
Vantagepoint
fund lineup
to make age-
appropriate
investing
available*

To make age appropriate investing available to our participants, we added Milestone Funds² to the Vantagepoint fund lineup. And in 2007, we introduced Guided Pathways™, which provides participants with varying levels of retirement plan advisory services, long-term care referral services, and certificate of deposit accounts.³

Looking ahead, we see many opportunities to advance our mission and to offer new and better services to our plan sponsors and participants. We look forward to the future and to continuing our primary goal – building retirement security.

2001

VantageCare Retirement
Health Savings program
launched

2005²

Vantagepoint
Milestone Funds
launched

2006

ICMA-RC spearheads
National Save for
Retirement Week

2007

Guided Pathways™
Managed Accounts
launched



For 35 years, ICMA-RC has led the state and local government retirement services industry to better educate participants and simplify the planning process. The stage is now set for many more decades of retirement planning leadership for public sector employers and their employees.



- ¹ *Please consult both the current applicable prospectus and Making Sound Investment Decisions: A Retirement Investment Guide carefully for a complete summary of all fees, expenses, charges, financial highlights, investment objectives, risks and performance information. Investors should consider the Fund's investment objectives, risks, charges and expenses before investing or sending money. The prospectus contains this and other information about the investment company. Please read the prospectus carefully before investing. All Vantagepoint Funds invested through 401 or 457 plans are held through Vantage Trust. Vantagepoint Funds are distributed by ICMA-RC Services LLC, a wholly owned broker-dealer subsidiary of ICMA-RC and member FINRA/SIPC. For a current prospectus, contact ICMA-RC Services, LLC by calling 800-669-7400 or by writing to 777 North Capitol Street, NE, Washington, DC 20002-4240, or by visiting www.icmarc.org. En Español llame al 800-669-8216.*
- ² *Please be advised that with "Fund of Funds" arrangements, additional underlying fees may apply. Please consult the prospectus for details.*
- ³ *Certificates of Deposit include penalties that may be assessed for withdrawals prior to maturity. Certificates of deposit are offered by banks not affiliated with ICMA-RC. Past performance is no guarantee of future results.*



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