



FEDERAL CIVILIAN EMPLOYEE RETIREMENT BENEFITS SEMINARS

COURSE DESCRIPTIONS

CSRS Retirement Benefits Presentations*

This course is designed for all CSRS and CSRS Offset employees. The seminar covers the main elements of CSRS benefits, including annuity computation, disability, and survivor benefits. Also covered are the Voluntary Contribution Program; Thrift Savings Plan with Roth Option; Health Benefits; Social Security; Federal Employee Group Life Insurance; Long-Term Care. There is also an overview of Planning for Retirement and Financial Planning. The presentation also includes a brief discussion of the necessary forms required and a 5-year pre-retirement checklist. The CSRS presentations are available in one or two-day formats.

FERS Retirement Benefits Presentations*

This course is designed for FERS employees and can be tailored for early, mid, or pre-retirement employees. The seminar covers the main elements of FERS, including annuity computation, disability, and survivor benefits. Also covered are Phased Retirement; Thrift Savings Plan with Roth Option; Health Benefits; Social Security; Federal Employee Group Life Insurance; Budgeting; Long-Term Care and an overview of Planning for Retirement and Financial Planning. The presentation also includes a brief discussion of the necessary forms required and a 5-year pre-retirement checklist. The FERS presentations are available in one or two-day formats.

Combined FERS & CSRS Retirement Benefits Presentations*

This course covers the main elements of both FERS and CSRS employee benefits. It includes information on the annuity calculation, specifics for FERS and CSRS disability, survivor benefits, the CSRS Voluntary Contribution Program, and the FERS Special Retirement Supplement. Also covered are Thrift Savings Plan with Roth Option, Health Benefits; Social Security; Federal Employee Group Life Insurance; Long-Term Care and an overview of Planning for Retirement and Financial Planning. The presentation also includes a brief discussion of the necessary forms required and a 5-year pre-retirement checklist. The Combined FERS & CSRS presentation is available in one or two-day formats.

Thrift Savings Plan & Financial Planning

This course is designed for all federal employees. The seminar covers the fundamentals of Retirement Planning, TSP with Roth Option, and integrating the TSP into an overall financial/retirement plan. The course includes Retirement Planning life stages, budgeting and calculating retirement income streams, investment options available in the TSP. Also discussed are risks associated with each investment option; how the TSP fits into CSRS and FERS retirement benefits; benefits of enrolling; earnings potential; matching funds; fund descriptions; vesting; loans; withdrawals and beneficiary information. The course includes a 5-year pre-retirement checklist. This presentation is available in a four-hour and one-day format.

ALL PRESENTATIONS ARE AVAILABLE IN-PERSON AND VIRTUALLY

**These seminars can be tailored to address Special Provisions employees (Law Enforcement Officers, Fire Fighters, Air Traffic Controllers) and other special groups upon request.*

