



San Diego : (858) 546-1400
San Jose : (408) 453-7200
Phoenix : (480) 361-3473

Financial Planning for Federal Employees Seminar Outline

Length:

1 day

Course Objectives:

Financial Planning seems to be a daunting task for most people. For Federal employees, this sense of things is made more challenging by the complexity of their employee benefits. This One-Day Financial Planning for Federal Employees (a.k.a. Federal Financial Literacy) provides employees with a basic understanding on the principles of financial and retirement planning within the context of the OPM's led Federal Financial Literacy Initiative. After attending this seminar, attendees will understand financial principles such a budgeting, saving and investing, credit and debt management, and estate and tax planning. They also will understand the importance of the TSP toward their retirement and be equipped with sound investment strategies for best leveraging what TSP has to offer. Finally, they will understand how their Federal employee benefits fit within the overall construct of a financial plan.

Overview:

Our Financial Literacy seminar is focused primarily in financial and estate planning as they pertain to Federal employees (either CSRS or FERS). The seminar consists of a series of presentation sessions designed to effectively convey key points and answer questions on a wide range of topics that cover basic retirement eligibility and benefits, and touch on the emotional and psychological aspects of retirement. The seminar will specifically focus on Federal retirement benefits and the impact of financial decisions on those benefits after retirement.

Syllabus: One-Day Introduction to Your Financial Planning Seminar for New FERS Employees

Taking Charge of Your Federal Benefits	Why We Have Insurance
Planning, Funding and Achieving Your Financial Goals	Long Term Care Insurance
Planning, Funding and Achieving Your Financial Goals	Estate Planning
Investment Planning	Benefits Planning
The Thrift Savings Plan (TSP)	
	<i>Seminar Wrap-Up</i>