



San Diego : (858) 546-1400  
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## Mid-Career Retirement Seminar Outline

Length:

1 day

### Course Objectives:

Federal employee benefits are complicated. This One-Day Mid-Career Retirement Planning Seminar informs attendees about the complex array of benefits available to them as Federal employees and the choices they need to make to best leverage them within the context of their overall financial and retirement plan. At the conclusion of this seminar, attendees will know when they are eligible to retire, which provisions of retirement law affect the computation of their retirement benefits, and how much those benefits are likely to be (FERS, Social Security, and TSP). They will also understand the importance of the TSP toward their retirement and be equipped with sound investment strategies for best leveraging what TSP has to offer. They will have a sense of the choices they will need to make regarding survivor benefits, their health (FEHB) and life insurance (FEGLI) coverages, and their TSP funds.

### Overview:

The one-day mid-career seminar for FERS employees includes lessons on the history of the Federal retirement programs, what constitutes credible service for retirement purposes, eligibility for retirement, and the computation of FERS annuities and survivor benefits. It also covers Social Security and thoroughly covers how to best leverage the Thrift Savings Plan as a retirement savings vehicle. All lessons are delivered by a highly experienced Federal benefits instructor and financial advisor with expertise on how these benefits fit within the overall frame work of a personal financial plan. The seminar consists of a series of PowerPoint Presentation delivered via lecture format and designed to effectively convey key points. The seminar will specifically focus on Federal retirement benefits and how they can be affected by the financial decisions attendees are making now and in the future.

Below is a sample summary agenda of the seminar. Content and delivery can be customized to meet agency specific needs.

### Syllabus: One-Day Mid-Career Retirement Planning Seminar for FERS Employees

The Federal Retirement Systems	The Thrift Savings Plan
Annuity Computations (includes FERS Supplement)	The Federal Employees' Group Life Insurance Program (FEGLI)
Survivor Benefits	The Federal Employees Health Benefits Program (FEHB), Medicare, and Dental/Vision
Social Security	Benefits Planning
	<b><i>Seminar Wrap-Up</i></b>