



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

Mid-Career Seminar Outline

Length:

2 days

Course Objectives:

This Two-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. Finally, they will understand how their Federal employee benefits fit within the overall construct of a financial plan.

Overview:

The two-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 thoroughly covers Social Security and the Thrift Savings Plan as well as financial planning, investing, and insurance. All lessons are delivered by a highly experienced Federal benefits instructor and financial advisor with expertise on how these benefits fit within the overall framework 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 and answer questions on the full range of topics covered during the seminar. 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.

A sample summary agenda of the seminar is on the next page. Content and delivery can be customized to meet agency specific needs.

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

<i>Day One:</i>	<i>Day Two:</i>
Taking Charge of Your Federal Benefits	The Thrift Savings Plan
Planning Funding and Achieving Your Financial Goals	Why We Have Insurance
The Federal Retirement Systems	The Federal Employees' Group Life Insurance Program (FEGLI)
Annuity Computations (includes FERS Supplement)	The Federal Employees Health Benefits Program (FEHB) and Medicare
Survivor Benefits	Long Term Care, Dental/Vision, and FSAs
Social Security	Benefits Planning
Investment Planning	
<i>Day One Wrap-Up</i>	<i>Seminar Wrap-Up</i>

