

Half-Day Mid-Career Retirement Planning Seminar

Length: ½ Day

Intended Audience: Employees with 5-15 years of Federal Service

Course Objectives: This Half-Day Retirement Planning Seminar is designed for Mid-career audiences as it informs attendees about the complex array of benefits they are earning as Federal employees and the choices they need to make to best leverage them to ensure they have a financially sound 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 (FGLI) coverages, and their TSP funds. Finally, they will understand how their Federal employee benefits fit within the overall construct of a financial plan.

Course Outline

- THE FEDERAL RETIREMENT SYSTEMS
 - ANNUITY COMPUTATIONS (INCLUDES FERS SUPPLEMENT)
 - SURVIVOR BENEFITS
 - SOCIAL SECURITY
 - THE THRIFT SAVINGS PLAN
 - THE FEDERAL EMPLOYEES' GROUP LIFE INSURANCE PROGRAM (FGLI)
 - THE FEDERAL EMPLOYEES HEALTH BENEFITS PROGRAM (FEHB), MEDICARE, AND DENTAL/VISION
 - BENEFITS PLANNING
 - SEMINAR WRAP-UP
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