



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

Pre-Retirement Seminar Outline

Length:

1 day

Course Objectives:

Retiring from a Federal career can be a confusing time, involving many choices that are both financial and psychological in nature. Retirement in general is a significant transition for anyone. This One-Day Pre-Retirement Seminar informs attendees about the complex array of benefits they have earned, the choices they need to make as they retire, and how to best leverage them within the context of their overall financial and retirement plan. After attending this seminar, attendees will know when they become eligible to retire, which provisions of retirement law affect the computation of their retirement benefits, and how much those benefits are likely to be (CSRS or FERS, Social Security, and TSP). They will know what choices they will need to make regarding survivor benefits, their health (FEHB) and life insurance (FGLI) coverages, and their TSP funds. They will also understand the overall Federal retirement process.

Overview:

The one-day seminar Pre-Retirement seminar, for either CSRS/CSRS Offset or FERS employees, includes lessons on history and financing of the Federal retirement programs, eligibility requirements, and benefit computations. It also thoroughly covers survivor benefits, social security, and the Thrift Savings Plan, and well as all of the Federal employee insurance programs. The seminar consists of a series of PowerPoint Presentations delivered via lecture format and 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.

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

CSRS and/or FERS Annuity Eligibility and Creditable Service	Social Security
CSRS and/or FERS Annuity Computations	The Thrift Savings Plan
CSRS and/or FERS Annuity Computations II	Federal Employees' Insurance in Retirement
CSRS and/or FERS Survivor Benefits	The Retirement Process
	<i>Seminar Wrap-Up</i>