

[View Full Course Details including Latest Schedule Online](#)

**PHOENIX TS**

# Mid-Career Retirement Planning Training

**Due to Covid-19 safety restrictions** PhoenixTS will temporarily be unable to provide food to our students who attend class at our Training Center; however, our Break Areas are **currently open** where students will find a constant supply of Coffee, Tea and Water. Students may bring their own lunch and snacks to eat in our breakrooms or at their seat in the classroom or eat out at one of the many nearby restaurants.

## Course Overview

Phoenix TS' Mid-Career Retirement instructor-led course is designed for professionals wishing to improve their retirement outlook and develop a realistic retirement plan. This course will provide students with the knowledge to:

- Prepare a retirement readiness index and a financial plan based on their retirement income needs
- Navigate through the tax-deferred Thrift-Savings Plan (TSP) retirement savings and investment account
- Navigate the Federal Employees Retirement System (FERS) defined benefit contributory account

## Schedule

DATE	LOCATION	
<b>8/30/22 - 8/31/22 (2 days)</b> 8:30AM - 4:00PM	<b>Chambersburg, PA</b> Sold Out	<a href="#">Contact Us</a>
<b>9/07/22 - 9/08/22 (2 days)</b> 8:00AM - 5:00PM	<b>Live Online</b> Sold Out	<a href="#">Contact Us</a>
<b>9/12/22 - 9/13/22 (2 days)</b> 8:30AM - 4:30PM	<b>Columbia, MD</b> Open	<a href="#">Contact Us</a>
<b>9/12/22 - 9/13/22 (2 days)</b> 8:30AM - 4:30PM	<b>Live Online</b> Open	<a href="#">Contact Us</a>



DATE	LOCATION	
<b>9/12/22 - 9/13/22 (2 days)</b> 8:30AM - 4:30PM	<b>Live Online</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>9/12/22 - 9/13/22 (2 days)</b> 8:30AM - 4:30PM	<b>Tysons Corner, VA</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>9/20/22 - 9/21/22 (2 days)</b> 8:00AM - 5:00PM	<b>Online (Central)</b> <a href="#">Sold Out</a>	<a href="#">Contact Us</a>
<b>11/14/22 - 11/15/22 (2 days)</b> 8:30AM - 4:30PM	<b>Tysons Corner, VA</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>11/14/22 - 11/15/22 (2 days)</b> 8:30AM - 4:30PM	<b>Live Online</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>11/14/22 - 11/15/22 (2 days)</b> 8:30AM - 4:30PM	<b>Columbia, MD</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>1/18/23 - 1/19/23 (2 days)</b> 8:30AM - 4:30PM	<b>Tysons Corner, VA</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>1/25/23 - 1/26/23 (2 days)</b> 8:30AM - 4:30PM	<b>Live Online</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>1/25/23 - 1/26/23 (2 days)</b> 8:30AM - 4:30PM	<b>Columbia, MD</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>2/13/23 - 2/14/23 (2 days)</b> 8:30AM - 4:30PM	<b>Tysons Corner, VA</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>2/20/23 - 2/21/23 (2 days)</b> 8:30AM - 4:30PM	<b>Live Online</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>2/20/23 - 2/21/23 (2 days)</b> 8:30AM - 4:30PM	<b>Columbia, MD</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>3/13/23 - 3/14/23 (2 days)</b> 8:30AM - 4:30PM	<b>Tysons Corner, VA</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>3/20/23 - 3/21/23 (2 days)</b> 8:30AM - 4:30PM	<b>Live Online</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>3/20/23 - 3/21/23 (2 days)</b> 8:30AM - 4:30PM	<b>Columbia, MD</b> <a href="#">Open</a>	<a href="#">Contact Us</a>



DATE	LOCATION	
<b>4/10/23 - 4/11/23 (2 days)</b> 8:30AM - 4:30PM	<b>Tysons Corner, VA</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>4/17/23 - 4/18/23 (2 days)</b> 8:30AM - 4:30PM	<b>Live Online</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>4/17/23 - 4/18/23 (2 days)</b> 8:30AM - 4:30PM	<b>Columbia, MD</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>5/08/23 - 5/09/23 (2 days)</b> 8:30AM - 4:30PM	<b>Tysons Corner, VA</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>5/15/23 - 5/16/23 (2 days)</b> 8:30AM - 4:30PM	<b>Live Online</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>5/15/23 - 5/16/23 (2 days)</b> 8:30AM - 4:30PM	<b>Columbia, MD</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>6/12/23 - 6/13/23 (2 days)</b> 8:30AM - 4:30PM	<b>Tysons Corner, VA</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>6/19/23 - 6/20/23 (2 days)</b> 8:30AM - 4:30PM	<b>Live Online</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>6/19/23 - 6/20/23 (2 days)</b> 8:30AM - 4:30PM	<b>Columbia, MD</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>7/10/23 - 7/11/23 (2 days)</b> 8:30AM - 4:30PM	<b>Tysons Corner, VA</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>7/17/23 - 7/18/23 (2 days)</b> 8:30AM - 4:30PM	<b>Live Online</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>7/17/23 - 7/18/23 (2 days)</b> 8:30AM - 4:30PM	<b>Columbia, MD</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>8/14/23 - 8/15/23 (2 days)</b> 8:30AM - 4:30PM	<b>Tysons Corner, VA</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>8/21/23 - 8/22/23 (2 days)</b> 8:30AM - 4:30PM	<b>Live Online</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>8/21/23 - 8/22/23 (2 days)</b> 8:30AM - 4:30PM	<b>Columbia, MD</b> <a href="#">Open</a>	<a href="#">Contact Us</a>



DATE	LOCATION	
<b>9/11/23 - 9/12/23 (2 days)</b> 8:30AM - 4:30PM	<b>Tysons Corner, VA</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>9/18/23 - 9/19/23 (2 days)</b> 8:30AM - 4:30PM	<b>Live Online</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>9/18/23 - 9/19/23 (2 days)</b> 8:30AM - 4:30PM	<b>Columbia, MD</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>10/16/23 - 10/17/23 (2 days)</b> 8:30AM - 4:30PM	<b>Tysons Corner, VA</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>10/23/23 - 10/24/23 (2 days)</b> 8:30AM - 4:30PM	<b>Live Online</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>10/23/23 - 10/24/23 (2 days)</b> 8:30AM - 4:30PM	<b>Columbia, MD</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>11/13/23 - 11/14/23 (2 days)</b> 8:30AM - 4:30PM	<b>Tysons Corner, VA</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>11/20/23 - 11/21/23 (2 days)</b> 8:30AM - 4:30PM	<b>Live Online</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>11/20/23 - 11/21/23 (2 days)</b> 8:30AM - 4:30PM	<b>Columbia, MD</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>12/11/23 - 12/12/23 (2 days)</b> 8:30AM - 4:30PM	<b>Tysons Corner, VA</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>12/18/23 - 12/19/23 (2 days)</b> 8:30AM - 4:30PM	<b>Live Online</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>12/18/23 - 12/19/23 (2 days)</b> 8:30AM - 4:30PM	<b>Columbia, MD</b> <a href="#">Open</a>	<a href="#">Contact Us</a>

## Course Outline

### Federal Employees Retirement Systems (FERS)

- FERS Eligibility for Retirement
- FERS Computation of Annuity
- FERS Creditable Civilian Service



- Retirement Deductions Never Withheld
- Making Payment to Get Credit for Service
- FERS Survivor Benefits
- FERS Disability Benefits
- FERS Annuity Supplement
- Refund of FERS Retirement Contributions

## Thrift Savings Plan (TSP)

- Overview
- TSP and Your Retirement Package
- Benefits of Participating
- Earnings Potential of Your TSP Account
- Eligibility
- Rehired Employees
- Investing Your TSP Account Contributions
- TSP Funds Overview
- Life Annuities
- Making or Changing Your Contribution Allocation
- Borrowing from your TSP
- In- Service Withdrawal
- Additional Info for Service Members
- Taxes
- Special Considerations
- Death Benefits

## Social Security

- Overview
- Eligibility
- Estimate Your Benefits
- Applying
- Considerations
- Windfall Elimination Provision
- Survivors Benefits
- Working While Receiving Benefits
- Government Pension Offset
- Earnings Limitation
- Taxation



## Retirement Benefits

- Federal Employees Health Benefits (FEHB)
- Federal Employees Dental and Vision Insurance Program
- Flexible Spending Account (FSA)
- Medicare
- Disability
- Survivor Benefits
- Federal Employees' Group Life Insurance (FEGLI)
- Federal Long Term Care Insurance (FLTCIP)
- Annual and Sick Leave
- Resources

## Making the Transition

- Creating Your Retirement Budget
- Selecting a Retirement Date
- Applying for Retirement
- Annuities
- Phased Retirement
- Finding Your Happiness in Retirement

## Financial Planning

- Financial Planning Overview
- Hiring a Financial Planner
- Employee Assistance Program (EAP)
- Estate Planning
- Wills
- Trusts
- Life Insurance
- Tax Planning

## Investing and Saving

- The Rule of 72
- The Power of Compound Interest
- Asset Allocation
- Diversification



# PhoenixTS

301-258-8200 | [Sales@PhoenixTS.com](mailto:Sales@PhoenixTS.com) | [www.PhoenixTS.com](http://www.PhoenixTS.com)

- Dollar Cost Averaging
- Traditional IRA's and Roth IRA's
- Funding College Education
- Investment Options
- Alternative Investments
- Tips and Tricks for Saving
- Short Term and Long Term Savings

## Managing Debt

- Revolving Versus Installment Debt
- Paying Off Your Mortgage
- Reverse Mortgages
- Equity Lines of Credit
- Consolidating Credit Cards
- Credit Scores and Credit History

## Your Action Plan

- Assess Your Retirement
- Assess Your Spending
- Assess Your Debt
- Compare Your Income and Expenses
- Envision Your Retirement
- Take Action on Your Retirement

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Starting at **\$1,495**

**ATTENTION**

For GSA pricing or Contractor quotes call  
[240.667.7757](tel:240.667.7757)

**GSA**



**Price Match Guarantee**

We'll match any competitor's price quote. Call us at 240-667-7757.

Included in this **Mid-Career Retirement Planning Training**

- 2 days instructor-led training
- Mid-Career Retirement Planning Training training book
- Notepad, pen and highlighter
- Variety of bagels, fruits, doughnuts and cereal available at the start of class\*
- Tea, coffee and soda available throughout the day\*
- Freshly baked cookies every afternoon\*