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PHOENIX TS

Pre-Retirement Planning Training

This training course is designed for professionals wishing to improve their retirement outlook and develop a realistic retirement plan.

Due to Covid-19 safety restrictions PhoenixTS will temporarily be unable to provide food or water to our students who attend class at our Training Center and all student Break Areas are currently closed. Students may bring their own lunch and snacks to eat at their seat in the classroom or eat out at nearby restaurants.

Course Overview

This course will provide students with knowledge to:

- Make informed decisions about retirement
- Civil Service Retirement System (CSRS)
- Federal Employee Retirement System (FERS)
- How Social Security benefits are calculated?
- How health and life insurance benefits carry over into retirement
- Medicare and Thrift Savings Plan (TSP)

Course Outline

Federal Employment Retirement Systems

- FERS Eligibility For Retirement
- FERS Computation of Annuity
- FERS Creditable Civilian Service
- FERS Creditable Military Service



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

Thrift Savings Plan

- 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
- Taxes, Special Considerations and Death Benefits

Social Security

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

Civil Service Retirement System (CSRS)

- CSRS Eligibility for Retirement
- CSRS Computation of Annuity
- CSRS Creditable Civilian Service
- CSRS Creditable Military Service
- CSRS Survivor Benefits



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- CSRS Disability
- Voluntary Contributions
- FERS Annuity Supplement

Retirement Benefits

- Federal Employees Health Benefits (FEHB)
- Federal Employees Dental and Vision Insurance Program
- Flexible Spending Account (FSA)
- Medicare
- Disability
- Survivor Benefits
- Federal Employee's Group Life Insurance (FEGLI)
- Annual and Sick Leave

Making The Transition

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

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



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- Asset Allocation
- Diversification
- Dollar Cost Averaging
- Traditional IRA's and Roth IRA'S
- Funding College Education
- Investment Options
- Alternative Investments

Managing Debt

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

Your Action Plan

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

Pre-Retirement Planning Training FAQs

Who should attend this training?

This course is intended for Federal employees of the United States Government who are on track for retirement and are participating in their retirement plan.

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Starting at **\$1,095**

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GSA



Price Match Guarantee

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

Included in this **Pre-Retirement Planning Training**

- 2 days instructor-led training
- Pre-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*



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◦ Freshly baked cookies every afternoon*