

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

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 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' Pre-Retirement Planning course covers the following topics: Make informed decisions about retirement, Civil Service Retirement System (CSRS), Federal Employee Retirement System (FERS), Social Security benefits, Health and life benefits, Medicare, and Thrift Savings Plan (TSP) withdrawal options and Financial, estate, and "life" planning. Participants will understand the Federal Employee Retirement System and the Federal employee benefits.

This course will provide participants with the 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)

## Schedule



DATE	LOCATION	
<b>8/30/22 - 8/31/22 (2 days)</b> 8:30AM - 4:00PM	<b>Fort Huachuca, AZ</b> Sold Out	<a href="#">Contact Us</a>
<b>9/13/22 - 9/14/22 (2 days)</b> 8:00AM - 5:00PM	<b>Live Online</b> Sold Out	<a href="#">Contact Us</a>
<b>9/27/22 - 9/28/22 (2 days)</b> 8:00AM - 5:00PM	<b>Online (Central)</b> Sold Out	<a href="#">Contact Us</a>
<b>9/27/22 - 9/28/22 (2 days)</b> 8:30AM - 4:00PM	<b>Chambersburg, PA</b> Sold Out	<a href="#">Contact Us</a>
<b>10/04/22 - 10/05/22 (2 days)</b> 8:30AM - 4:30PM	<b>Columbia, MD</b> Open	<a href="#">Contact Us</a>
<b>10/04/22 - 10/05/22 (2 days)</b> 8:30AM - 4:30PM	<b>Live Online</b> Open	<a href="#">Contact Us</a>
<b>10/04/22 - 10/05/22 (2 days)</b> 8:30AM - 4:30PM	<b>Tysons Corner, VA</b> Open	<a href="#">Contact Us</a>
<b>12/07/22 - 12/08/22 (2 days)</b> 8:30AM - 4:30PM	<b>Tysons Corner, VA</b> Open	<a href="#">Contact Us</a>
<b>12/07/22 - 12/08/22 (2 days)</b> 8:30AM - 4:30PM	<b>Live Online</b> Open	<a href="#">Contact Us</a>
<b>12/07/22 - 12/08/22 (2 days)</b> 8:30AM - 4:30PM	<b>Columbia, MD</b> Open	<a href="#">Contact Us</a>
<b>1/04/23 - 1/05/23 (2 days)</b> 8:30AM - 4:30PM	<b>Tysons Corner, VA</b> Open	<a href="#">Contact Us</a>
<b>1/11/23 - 1/12/23 (2 days)</b> 8:30AM - 4:30PM	<b>Columbia, MD</b> Open	<a href="#">Contact Us</a>
<b>1/11/23 - 1/12/23 (2 days)</b> 8:30AM - 4:30PM	<b>Live Online</b> Open	<a href="#">Contact Us</a>
<b>2/01/23 - 2/02/23 (2 days)</b> 8:30AM - 4:30PM	<b>Tysons Corner, VA</b> Open	<a href="#">Contact Us</a>
<b>2/08/23 - 2/09/23 (2 days)</b> 8:30AM - 4:30PM	<b>Columbia, MD</b> Open	<a href="#">Contact Us</a>



DATE	LOCATION	
<b>2/08/23 - 2/09/23 (2 days)</b> 8:30AM - 4:30PM	<b>Live Online</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>3/01/23 - 3/02/23 (2 days)</b> 8:30AM - 4:30PM	<b>Tysons Corner, VA</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>3/08/23 - 3/09/23 (2 days)</b> 8:30AM - 4:30PM	<b>Columbia, MD</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>3/08/23 - 3/09/23 (2 days)</b> 8:30AM - 4:30PM	<b>Live Online</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>4/05/23 - 4/06/23 (2 days)</b> 8:30AM - 4:30PM	<b>Tysons Corner, VA</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>4/12/23 - 4/13/23 (2 days)</b> 8:30AM - 4:30PM	<b>Columbia, MD</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>4/12/23 - 4/13/23 (2 days)</b> 8:30AM - 4:30PM	<b>Live Online</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>5/03/23 - 5/04/23 (2 days)</b> 8:30AM - 4:30PM	<b>Tysons Corner, VA</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>5/10/23 - 5/11/23 (2 days)</b> 8:30AM - 4:30PM	<b>Columbia, MD</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>5/10/23 - 5/11/23 (2 days)</b> 8:30AM - 4:30PM	<b>Live Online</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>6/07/23 - 6/08/23 (2 days)</b> 8:30AM - 4:30PM	<b>Tysons Corner, VA</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>6/14/23 - 6/15/23 (2 days)</b> 8:30AM - 4:30PM	<b>Columbia, MD</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>6/14/23 - 6/15/23 (2 days)</b> 8:30AM - 4:30PM	<b>Live Online</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>7/05/23 - 7/06/23 (2 days)</b> 8:30AM - 4:30PM	<b>Tysons Corner, VA</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>7/12/23 - 7/13/23 (2 days)</b> 8:30AM - 4:30PM	<b>Columbia, MD</b> <a href="#">Open</a>	<a href="#">Contact Us</a>



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<b>7/12/23 - 7/13/23 (2 days)</b> 8:30AM - 4:30PM	<b>Live Online</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>8/02/23 - 8/03/23 (2 days)</b> 8:30AM - 4:30PM	<b>Tysons Corner, VA</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
<b>8/09/23 - 8/10/23 (2 days)</b> 8:30AM - 4:30PM	<b>Columbia, MD</b> <a href="#">Open</a>	<a href="#">Contact Us</a>
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<b>12/13/23 - 12/14/23 (2 days)</b> 8:30AM - 4:30PM	<b>Live Online</b> <a href="#">Open</a>	<a href="#">Contact Us</a>



# PhoenixTS

## Course Outline

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

### 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
- 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)



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- Estate Planning
- Wills
- Trusts
- Life Insurance
- Tax Planning

## Investing and Saving

- The Rule of 72
- The Power of Compound Interest
- 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?



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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.

**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.

Starting at **\$1,295**

## 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.





**PhoenixTS**

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## 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\*
- Freshly baked cookies every afternoon\*