



Federal Retirement Training
What's in Your Retirement Wallet?
New York City FEB
26 Federal Plaza



February 7, 2018

Presentations by the Federal Retirement Thrift Investment Board (TSP), the U.S. Securities & Exchange Commission, Social Security Administration, and the U.S. Office of Personnel Management

8:00am Registration

8:15am–12:30pm Thrift Savings Plan/Stewart Kaplan/Federal Retirement Thrift Investment Board

- Benefits of the TSP
- TSP Contributions
- Traditional vs Roth TSP
- TSP Core Funds & Lifecycle Funds
- Managing TSP Account

10:00-10:15am Break

10:15am-12:30pm

- Pre-Separation Preparation
- In-Service Withdrawals
- Post-Service Withdrawals
- Death Benefits
- TSP Tips and Resources

12:30-1:30pm Lunch on your own

1:30-2:25pm Investing Outside the TSP/Kathleen Furey/U.S. Securities & Exchange Commission

A few things to consider if you invest outside the TSP, including:

- Investment Professionals
- Fees and Expenses—and Why They Matter
- Common Products
- Resources for More Information

2:25pm-2:30pm Break

2:30-3:50pm CSRS and FERS Overview/Shania Hill/U.S. Office of Personnel Management

- Comparison of both retirement systems
- Eligibility requirements
- Survivor benefits
- Deposits and re-deposits, contributions and other topics you to consider as you are faced with these important decisions

3:50-4:00pm Break

4:00-5:00pm Social Security Benefits Overview/David Gurzynski/Social Security Administration

- How Social Security Benefits Supplement Your FERS Retirement
- Overview of Social Security benefits and strategic choices

5:00pm Wrap-Up and Adjourn