

**Federal Retirement Training**  
**What's in Your Retirement Wallet?**

May 20, 2016

San Francisco Federal Building-90 7<sup>th</sup> Street (Basement)

*Sponsored by the Federal Retirement Thrift Investment Board, Security Exchange Commission, Office of Personnel Management, and San Francisco Federal Executive Board*



**7:30am: Registration**

**8:00–9:15am: CSRS and FERS Overview/Johnny Bynum/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

**9:20-10:15am: Investing Outside the TSP/ Victoria Prescott/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

**10:15-10:30am: Break**

**10:30-11:45am: Social Security Benefits Overview/Rob Pepper/Social Security Administration**

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

**11:45am-12:45pm: Lunch on your own**

**12:45-5:00pm Thrift Savings Plan A-Z/Randy Urban/Federal Retirement Thrift Investment Board-**

*12:45-2:45pm TSP for Early to Mid-Career*

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

*(2:45-3:00pm-break)*

*3:00-5:00pm TSP Pre-Separation Briefing*

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

**5:00pm: Wrap-up and Adjourn**