COURSE SYLLABUS

Pre-Retirement Planning Course (CSRS Participants Only)

Understand CSRS retirement calculations, coverage options, and post-retirement benefits for federal employees covered by the Civil Service Retirement System.

> Group classes (Live Online) and onsite training are available for this course. For more information, email onsite@graduateschool.edu or visit: https://sdfm.graduateschool.edu/courses/preretirement-planning-csrs-participants-only



CustomerRelations@graduateschool.edu • (888) 744-4723

Course Outline

Module 1: Introduction to Federal Employee Benefits

- Gain an overview of federal employee benefits and their importance in retirement planning.
- Understand eligibility criteria for various benefit programs.
- Identify key resources and agencies that administer benefits.

Module 2: Health Insurance Options

- Explore the Federal Employees Health Benefits (FEHB) Program.
- Learn about plan types, premiums, and cost-sharing.
- Understand how life events and retirement affect coverage.

Module 3: Life Insurance Programs

- Review the Federal Employees' Group Life Insurance (FEGLI) Program.
- Examine available coverage options and costs.
- Understand the impact of retirement on life insurance benefits.

Module 4: Long Term Care Insurance

- Understand the Federal Long Term Care Insurance Program (FLTCIP).
- Review eligibility, enrollment, and premium structure.
- Evaluate coverage options based on personal needs.

Module 5: Flexible Spending Accounts

- Learn about Health Care and Dependent Care FSAs.
- Understand tax advantages and contribution limits.
- Identify qualifying expenses and reimbursement processes.

Module 6: Dental and Vision Insurance

- Explore the Federal Employees Dental and Vision Insurance Program (FEDVIP).

- Understand enrollment, plan types, and coverage details.
- Compare plan options to meet personal and family needs.

Module 7: Retirement Benefits Overview

- Review the Civil Service Retirement System (CSRS) components.
- Understand pension calculation and eligibility requirements.
- Learn about the Thrift Savings Plan (TSP) and Social Security integration.

Module 8: Pre-Retirement Planning

- Develop a comprehensive pre-retirement plan.
- Identify timelines and action steps for benefit elections.
- Understand the impact of benefits decisions on long-term financial security.