COURSE SYLLABUS

Pre-Retirement Planning Course

Acquire the information you need to make fully informed decisions about retirement. Gain valuable retirement planning information related to the Civil Service Retirement System (CSRS) and the Federal Employee Retirement System (FERS). Learn how Social Security benefits are calculated, and how your health and life insurance benefits carry over into retirement. Learn about Medicare and Thrift Savings Plan (TSP) withdrawal options. Receive an overview of financial, estate, and "life" planning.

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



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Course Outline

Module 1: Overview of Federal Employee Benefits

- Understand the structure and administration of federal employee benefits programs.
- Identify key agencies and legislation governing benefits.
- Explore eligibility criteria for various benefits.

Module 2: Retirement Systems

- Examine the Civil Service Retirement System (CSRS) and the Federal Employees Retirement System (FERS).
- Understand contributions, annuity calculations, and retirement eligibility.
- Learn about creditable service and early retirement provisions.

Module 3: Health and Life Insurance

- Review the Federal Employees Health Benefits (FEHB) Program and coverage options.
- Understand the Federal Employees' Group Life Insurance (FEGLI) Program.
- Explore enrollment, premiums, and continuation of coverage after retirement.

Module 4: Thrift Savings Plan (TSP)

- Learn about TSP features, investment options, and contribution limits.
- Understand matching contributions and tax implications.
- Review withdrawal options and required minimum distributions.

Module 5: Leave Policies and Other Benefits

- Explore annual, sick, and other leave entitlements.
- Understand family and medical leave policies.
- Identify additional benefits such as transit subsidies and flexible work arrangements.