



Course Title: Tax Planning for Federal Employees
Target Audience: All Federal Employees
Course Length: 3 Hours

Tax planning is a crucial part of financial planning at all stages of one's career. The class will discuss topics ranging from the TSP basics through tax minimization opportunities now and into the retirement years. Topics to be covered:

- What is Taxable Income?
- Timing Financial Activities
- Tax Shelters
- How do the Roth IRA and Roth TSP differ from a Traditional IRA?
- Sale of Principal Residence
- Federal and State Taxation of Federal Annuities, Social Security and the TSP
- Coordinating TSP and IRA Contributions as well as Distributions
- Starting a Small Business
- Where to Obtain Further Information

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