NITP Virtual Training Brochure

OPEN ENROLLMENT OFFERINGS: JULY – NOVEMBER 2022

National Institute of Transition Planning, Inc. (NITP) is the source for Federal benefits and financial planning seminars and webinars. Since 1984, our mission has been to educate Federal employees and enable them to make informed and sound decisions about their financial futures and retirement options. Our team of presenters is comprised of Subject Matter Experts which include Federal Benefits Specialists, Certified Financial Planners, Certified Public Accountants, Attorneys (all members of a State Bar) and Transition Coaches.

Mid-Career Planning for FERS Employees	Planning for Retirement for CSRS Employees	Planning for Retirement for FERS Employees
July 2022 **September 2022** **November 2022**		**September 2022** **October 2022**
	**September 2022**	

ON DEMAND ACCESS

Participants are encouraged to attend the live presentation. In addition, the recorded version is available to each registered participant 24/7 for a period of **ninety (90) days** following the live presentation.

REGISTRATION

Registrations may be submitted by completing the form through this link: **Individual Registration Form**
or by completing the form through this QR code:

If your agency will be registering multiple employees, please contact OpenEnrollment@nitpinc.com to request an Excel template to submit registration information.

MID-CAREER PLANNING FOR FERS EMPLOYEES 4 Part Webinar Series	
The "Mid-Career Planning for FERS Employees" is designed for the FERS employee with 5-20 years of Federal service and will provide participants a comprehensive look at their Federal benefits and an understanding of financial planning concerns and options. 	**July 2022** **September 2022** **November 2022**

MID-CAREER PLANNING FOR FERS EMPLOYEES – JULY 2022 COURSE CODE: JUL2022MCP	Live Webinar Presentation
FERS Federal Benefits – Creditable service, deposits/redeposits, eligibility to retire, the FERS annuity, FERS annuity supplement, MRA +10 age-reduced retirement, leaving Federal service and/or death before retirement	July 18, 2022 1:00-3:00 PM ET
Social Security and Insurance Benefits – Social Security eligibility/ calculation/claiming strategies, FEHB, FEDVIP, FSAs, LTC, FEGLI	July 19, 2022 1:00-3:00 PM ET
Financial Planning – Establishing financial goals, managing debt – credit cards and equity lines of credit, funding college, IRAs – traditional and Roth	July 25, 2022 1:00-3:00 PM ET
TSP for FERS Employees – Overview of the funds including the L-Fund, borrowing from the TSP, determining allocation between the funds, Roth TSP	July 26, 2022 1:00-3:00 PM ET
REGISTRATION FEE: $110.00 Per Person	**REGISTRATION DEADLINE: June 11, 2022**

MID-CAREER PLANNING FOR FERS EMPLOYEES – SEPTEMBER 2022 COURSE CODE: SEP2022MCP	Live Webinar Presentation
FERS Federal Benefits – Creditable service, deposits/redeposits, eligibility to retire, the FERS annuity, FERS annuity supplement, MRA +10 age-reduced retirement, leaving Federal service and/or death before retirement	September 27, 2022 1:00-3:00 PM ET
Social Security and Insurance Benefits – Social Security eligibility/ calculation/claiming strategies, FEHB, FEDVIP, FSAs, LTC, FEGLI	September 28, 2022 1:00-3:00 PM ET
Financial Planning – Establishing financial goals, managing debt – credit cards and equity lines of credit, funding college, IRAs – traditional and Roth	September 29, 2022 1:00-3:00 PM ET
TSP for FERS Employees – Overview of the funds including the L-Fund, borrowing from the TSP, determining allocation between the funds, Roth TSP	September 30, 2022 1:00-3:00 PM ET
REGISTRATION FEE: $110.00 Per Person	**REGISTRATION DEADLINE: September 20, 2022**

MID-CAREER PLANNING FOR FERS EMPLOYEES – NOVEMBER 2022 COURSE CODE: NOV2022MCP	Live Webinar Presentation
FERS Federal Benefits – Creditable service, deposits/redeposits, eligibility to retire, the FERS annuity, FERS annuity supplement, MRA +10 age-reduced retirement, leaving Federal service and/or death before retirement	November 7, 2022 1:00-3:00 PM ET
Social Security and Insurance Benefits – Social Security eligibility/ calculation/claiming strategies, FEHB, FEDVIP, FSAs, LTC, FEGLI	November 8, 2022 1:00-3:00 PM ET
Financial Planning – Establishing financial goals, managing debt – credit cards and equity lines of credit, funding college, IRAs – traditional and Roth	November 9, 2022 1:00-3:00 PM ET
TSP for FERS Employees – Overview of the funds including the L-Fund, borrowing from the TSP, determining allocation between the funds, Roth TSP	November 10, 2022 1:00-3:00 PM ET
REGISTRATION FEE: $110.00 Per Person	**REGISTRATION DEADLINE: October 31, 2022**

PLANNING FOR RETIREMENT FOR CSRS EMPLOYEES
9 Part Webinar Series

The “Planning for Retirement for CSRS Employees” course provides the CSRS employee a thorough look at their Federal retirement benefits, an understanding of financial planning strategies, estate planning concerns and transition to retirement. The training is in webinar format and is comprised of nine (9) sessions, each with ninety (90) minutes of content coverage and up to thirty (30) minutes for Q&A throughout the session.	**September 2022**

PLANNING FOR RETIREMENT FOR CSRS EMPLOYEES – SEPTEMBER 2022 COURSE CODE: SEP2022CSRS	Live Webinar Presentation
CSRS Federal Retirement Benefits – CSRS and CSRS Offset, eligibility, creditable service, service deposits, basic retirement benefit computation	September 7, 2022 1:00–3:00 PM ET
CSRS Federal Retirement Benefits – CSRS and CSRS Offset, disability retirement, retiree COLAs, choosing a date to retire, survivor benefit considerations, Voluntary Contributions Plan	September 8, 2022 1:00–3:00 PM ET
Social Security & Medicare – Qualifying for a benefit, when to apply, widow(er) & family benefits, Medicare – A & B and how it works with FEHB	September 9, 2022 1:00–3:00 PM ET
Federal Insurances – Now and in retirement - FEHB, FEGLI, FSAs, FEDVIP, LTC	September 12, 2022 1:00–3:00 PM ET
Financial Planning – Get Organized – Goals, Balance Sheet & Cash Flow, Budgeting, Debt Management	September 13, 2022 1:00–3:00 PM ET
Financial Planning – TSP Contributions, Fund Choices and Allocation, TSP at Retirement, IRAs – Roth v. Traditional, Roth Conversion, Transfer v. Rollover	September 16, 2022 1:00–3:00 PM ET
Financial Planning – Have a Plan – Cash Flow, Housing Choices, Insurance Needs	September 19, 2022 1:00–3:00 PM ET
Estate Planning – Lifetime documents, Powers of Attorney, health care directives, testamentary planning, transfer of assets, beneficiary designations	September 20, 2022 1:00–3:00 PM ET
Transition to Retirement – Retirement phases, time allocation, retirement expectations, relationships, single life, work/volunteer/leisure activities	September 21, 2022 1:00–3:00 PM ET
REGISTRATION FEE: $175.00 Per Person	**REGISTRATION DEADLINE: August 31, 2022**

PLANNING FOR RETIREMENT FOR FERS EMPLOYEES 9 Part Webinar Series	
The "Planning for Retirement for FERS Employees" course is designed for the FERS employee with 10 years or fewer until retirement eligibility. It will provide participants a comprehensive look at their Federal retirement benefits, an understanding of financial planning strategies, estate planning concerns and transition to retirement. The training is in webinar format and is comprised of nine (9) two-hour sessions. The time frame allows for ninety (90) minutes of content coverage and up to thirty (30) minutes of Q&A throughout the session. 	**September 2022** **October 2022**

PLANNING FOR RETIREMENT FOR FERS EMPLOYEES – SEPTEMBER 2022 **COURSE CODE: SEP2022PFR**	Live Webinar Presentation
FERS and TransFERS, Eligibility, Creditable Service, Service Deposits, Basic retirement benefit computation	September 7, 2022 1:00–3:00 PM ET
FERS and TransFERS, Disability retirement, Retiree COLAs, choosing a date to retire, survivor benefit considerations, retirement timeline	September 8, 2022 1:00–3:00 PM ET
Social Security & Medicare – Qualifying for a benefit, when to apply, widow(er) & family benefits, Medicare – A & B and how it works with FEHB	September 9, 2022 1:00–3:00 PM ET
Federal Insurances – Now and in retirement - FEHB, FEGLI, FSAs, FEDVIP, LTC	September 12, 2022 1:00–3:00 PM ET
Financial Planning – Get Organized – Goals, Balance Sheet & Cash Flow, Budgeting, Debt Management	September 13, 2022 1:00–3:00 PM ET
Financial Planning – TSP Contributions, Fund Choices and Allocation, TSP at Retirement, IRAs – Roth v. Traditional, Roth Conversion, Transfer v. Rollover	September 16, 2022 1:00–3:00 PM ET
Financial Planning – Have a Plan – Cash Flow, Housing Choices, Insurance Needs	September 19, 2022 1:00–3:00 PM ET
Estate Planning – Lifetime documents, Powers of Attorney, health care directives, testamentary planning, transfer of assets, beneficiary designations	September 20, 2022 1:00–3:00 PM ET
Transition to Retirement – Retirement phases, time allocation, retirement expectations, relationships, single life, work/volunteer/leisure activities	September 21, 2022 1:00–3:00 PM ET
REGISTRATION FEE: $175.00 Per Person	**REGISTRATION DEADLINE: August 31, 2022**

PLANNING FOR RETIREMENT FOR FERS EMPLOYEES – OCTOBER 2022 **COURSE CODE: OCT2022PFR**	Live Webinar Presentation
FERS and TransFERS, Eligibility, Creditable Service, Service Deposits, Basic retirement benefit computation	October 11, 2022 1:00–3:00 PM ET
FERS and TransFERS, Disability retirement, Retiree COLAs, choosing a date to retire, survivor benefit considerations, retirement timeline	October 12, 2022 1:00–3:00 PM ET
Social Security & Medicare – Qualifying for a benefit, when to apply, widow(er) & family benefits, Medicare – A & B and how it works with FEHB	October 13, 2022 1:00–3:00 PM ET
Federal Insurances – Now and in retirement - FEHB, FEGLI, FSAs, FEDVIP, LTC	October 17, 2022 1:00–3:00 PM ET
Financial Planning – Get Organized – Goals, Balance Sheet & Cash Flow, Budgeting, Debt Management	October 18, 2022 1:00–3:00 PM ET
Financial Planning – TSP Contributions, Fund Choices and Allocation, TSP at Retirement, IRAs – Roth v. Traditional, Roth Conversion, Transfer v. Rollover	October 19, 2022 1:00–3:00 PM ET
Financial Planning – Have a Plan – Cash Flow, Housing Choices, Insurance Needs	October 24, 2022 1:00–3:00 PM ET
Transition to Retirement – Retirement phases, time allocation, retirement expectations, relationships, single life, work/volunteer/leisure activities	October 25, 2022 1:00–3:00 PM ET
Estate Planning – Lifetime documents, Powers of Attorney, health care directives, testamentary planning, transfer of assets, beneficiary designations	October 27, 2022 1:00–3:00 PM ET
REGISTRATION FEE: $175.00 Per Person	**REGISTRATION DEADLINE: October 4, 2022**

CLOSED CAPTIONING

Closed Captioning is available for all presentations.

RESOURCE DOCUMENTS

Handouts will be made available to all registered participants via electronic download.

ATTENDANCE REPORTS

For agencies registering multiple employees, NITP is available to provide attendance reports. If requested, they will be prepared after the final session of the "live" series and also a 90-day follow-up attendance report to include on-demand attendance. Please submit your request for attendance reports to webinar@nitpinc.com.

COMMUNICATIONS WITH REGISTERED EMPLOYEES

After the registration deadline has passed, NITP will provide confirmation to Registered Employees via email. The registration confirmation will contain the program schedule and basic instructions. In addition, the registrant will receive two reminder emails. The first email will be sent two (2) calendar days prior to the start of the live presentation. A second email will be sent two (2) hours prior to the start of the presentation.

BILLING AND PAYMENT INFORMATION

Government purchase cards and SF-182 forms will be accepted as approved method of payment. For information and questions about billing and payment questions, submit your request to accounting@nitpinc.com.

CONTACT US

For further information or any questions, email us at OpenEnrollment@nitpinc.com.