

COURSE OUTLINE

NITP

National Institute of
Transition Planning, Inc.

TITLE: Retirement Refresher

LENGTH: 3 hours

AUDIENCE: Federal Employees retiring within 1 year and have previously attended a Retirement Planning Seminar

This course is designed to provide the employee who is within 1 year of retirement a review of Federal Benefits options.

Topics include:

- Annuity Calculation
- How to Apply for Retirement
- Best Date to Retire
- Retirement Processing and Timeline
- Survivor Benefits Election
- COLAs
- Beneficiary Designations
- FEGLI and FEHB after Retirement
- Overview of Medicare Parts A & B
- Social Security – When and How to Apply
- Forms and Resources