NITP Virtual Training Brochure

OPEN ENROLLMENT OFFERINGS: CY2023

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	**July 2023** **November 2023**
Planning for Retirement for FERS Employees	**August 2023** **October 2023**

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.

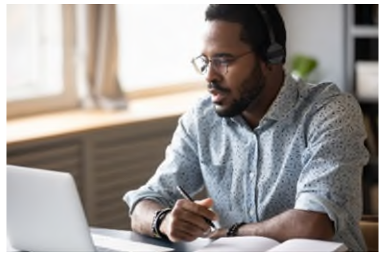
REGISTRATION

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 2023
November 2023

MID-CAREER PLANNING FOR FERS EMPLOYEES – JULY 2023 COURSE CODE: JUL2023MCP	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 17, 2023 1:00-3:00 PM ET
Social Security and Insurance Benefits – Social Security eligibility/ calculation/claiming strategies, FEHB, FEDVIP, FSAs, LTC, FEGLI	July 18, 2023 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 24, 2023 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 25, 2023 1:00-3:00 PM ET
REGISTRATION FEE: $125.00 Per Person **Registration of Groups of 10 or more: $110.00 Per Person**	**REGISTRATION DEADLINE: July 10, 2023**

MID-CAREER PLANNING FOR FERS EMPLOYEES – NOVEMBER 2023 COURSE CODE: NOV2023MCP	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 13, 2023 1:00-3:00 PM ET
Social Security and Insurance Benefits – Social Security eligibility/ calculation/claiming strategies, FEHB, FEDVIP, FSAs, LTC, FEGLI	November 14, 2023 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 15, 2023 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 16, 2023 1:00-3:00 PM ET
REGISTRATION FEE: $125.00 Per Person **Registration of Groups of 10 or more: $110.00 Per Person**	**REGISTRATION DEADLINE: November 6, 2023**

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.

August 2023
October 2023

PLANNING FOR RETIREMENT FOR FERS EMPLOYEES – AUGUST 2023 **COURSE CODE: AUG2023PFR**	Live Webinar Presentation
FERS and TransFERS, Eligibility, Creditable Service, Service Deposits, Basic retirement benefit computation	August 9, 2023 1:00 – 3:00 PM ET
FERS and TransFERS, Disability retirement, Retiree COLAs, choosing a date to retire, survivor benefit considerations, retirement timeline	August 10, 2023 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	August 11, 2023 1:00 – 3:00 PM ET
Federal Insurances – Now and in retirement - FEHB, FEGLI, FSAs, FEDVIP, LTC	August 14, 2023 1:00 – 3:00 PM ET
Financial Planning – Get Organized – Goals, Balance Sheet & Cash Flow, Budgeting, Debt Management	August 15, 2023 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	August 18, 2023 1:00 – 3:00 PM ET
Financial Planning – Have a Plan – Cash Flow, Housing Choices, Insurance Needs	August 21, 2023 1:00 – 3:00 PM ET
Estate Planning – Lifetime documents, Powers of Attorney, health care directives, testamentary planning, transfer of assets, beneficiary designations	August 23, 2023 1:00 – 3:00 PM ET
Transition to Retirement – Retirement phases, time allocation, retirement expectations, relationships, single life, work/volunteer/leisure activities	August 25, 2023 1:00 – 3:00 PM ET
REGISTRATION FEE: $195.00 Per Person **Registration of Groups of 10 or more: $175.00 Per Person**	**REGISTRATION DEADLINE: August 2, 2023**

PLANNING FOR RETIREMENT FOR FERS EMPLOYEES – OCTOBER 2023 **COURSE CODE: OCT2023PFR**	Live Webinar Presentation
FERS and TransFERS, Eligibility, Creditable Service, Service Deposits, Basic retirement benefit computation	October 2, 2023 1:00–3:00 PM ET
FERS and TransFERS, Disability retirement, Retiree COLAs, choosing a date to retire, survivor benefit considerations, retirement timeline	October 5, 2023 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 6, 2023 1:00–3:00 PM ET
Federal Insurances – Now and in retirement - FEHB, FEGLI, FSAs, FEDVIP, LTC	October 10, 2023 1:00–3:00 PM ET
Estate Planning – Lifetime documents, Powers of Attorney, health care directives, testamentary planning, transfer of assets, beneficiary designations	October 11, 2023 1:00–3:00 PM ET
Transition to Retirement – Retirement phases, time allocation, retirement expectations, relationships, single life, work/volunteer/leisure activities	October 13, 2023 1:00–3:00 PM ET
Financial Planning – Get Organized – Goals, Balance Sheet & Cash Flow, Budgeting, Debt Management	October 16, 2023 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 17, 2023 1:00–3:00 PM ET
Financial Planning – Have a Plan – Cash Flow, Housing Choices, Insurance Needs	October 20, 2023 1:00–3:00 PM ET
REGISTRATION FEE: $195.00 Per Person **Registration of Groups of 10 or more: $175.00 Per Person**	**REGISTRATION DEADLINE: September 25, 2023**

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 OpenEnrollment@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) 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.