OPEN ENROLLMENT WEBINARS FY 2025

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 instructors is comprised of Subject Matter Experts which include Federal Benefits Specialists, Certified Financial Planners, Attorneys (all members of a State Bar) and Transition Coaches.

Planning for Retirement for FERS Employees
March | May | August
2025

Mid-Career Planning for FERS Employees
February | July
2025

Planning for Retirement for CSRS Employees
May
2025

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.

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.

March 2025
May 2025
August 2025

PLANNING FOR RETIREMENT FOR FERS EMPLOYEES	Live Webinar Presentations *All Sessions Run 1:00–3:00 PM ET*		
	MARCH	**MAY**	**AUGUST**
FERS Federal Benefits - FERS and TransFERS, Eligibility, Creditable Service, Service Deposits, Basic retirement benefit computation	March 3, 2025	May 5, 2025	August 4, 2025
FERS Federal Benefits - FERS and TransFERS, Disability retirement, Retiree COLAs, choosing a date to retire, survivor benefit considerations, retirement timeline	March 5, 2025	May 7, 2025	August 6, 2025
Social Security & Medicare – Qualifying for a benefit, when to apply, widow(er) & family benefits, Medicare – A & B and how it works with FEHB	March 6, 2025	May 8, 2025	August 7, 2025
Federal Insurances – Now and in retirement - FEHB, FEGLI, FSAs, FEDVIP, LTC	March 10, 2025	May 12, 2025	August 11, 2025
Financial Planning – Get Organized – Goals, Balance Sheet & Cash Flow, Budgeting, Debt Management	March 12, 2025	May 14, 2025	August 13, 2025
Financial Planning – TSP & IRAs – TSP Contributions, Fund Choices and Allocation, TSP at Retirement, IRAs – Roth v. Traditional, Roth Conversion, Transfer v. Rollover	March 13, 2025	May 15, 2025	August 14, 2025
Financial Planning – Have a Plan – Cash Flow, Housing Choices, Insurance Needs	March 17, 2025	May 19, 2025	August 18, 2025
Estate Planning – Lifetime documents, Powers of Attorney, health care directives, testamentary planning, transfer of assets, beneficiary designations	March 19, 2025	May 21, 2025	August 20, 2025
Transition to Retirement – Retirement phases, time allocation, retirement expectations, relationships, single life, work/volunteer/leisure activities	March 20, 2025	May 22, 2025	August 21, 2025
COURSE CODE:	**MAR2025PFR**	**MAY2025PFR**	**AUG2025PFR**
REGISTRATION DEADLINE:	Feb 24, 2025	April 28, 2025	July 28, 2025

REGISTRATION FEE: $195.00 Per Person
Registration of Groups of 10 or more: $175.00 Per Person

PLANNING FOR RETIREMENT FOR CSRS EMPLOYEES
9 Part Webinar Series

The "Planning for Retirement for CSRS Employees" course is designed for the CSRS 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.

May 2025

PLANNING FOR RETIREMENT FOR CSRS EMPLOYEES	**Live Webinar Presentation** *All Sessions Run 1:00–3:00 PM ET*
	MAY
CSRS Federal Benefits – CSRS and CSRS Offset, eligibility, creditable service, service deposits, basic retirement benefit computation	May 5, 2025
CSRS Federal Benefits – CSRS and CSRS Offset, disability retirement, retiree COLAs, choosing a date to retire, survivor benefit considerations, Voluntary Contributions Plan	May 7, 2025
Social Security & Medicare – Qualifying for a benefit, when to apply, widow(er) & family benefits, Medicare – A & B and how it works with FEHB	May 8, 2025
Federal Insurances – Now and in retirement - FEHB, FEGLI, FSAs, FEDVIP, LTC	May 12, 2025
Financial Planning – Get Organized – Goals, Balance Sheet & Cash Flow, Budgeting, Debt Management	May 14, 2025
Financial Planning – TSP & IRAs - TSP Contributions, Fund Choices and Allocation, TSP at Retirement, IRAs – Roth v. Traditional, Roth Conversion, Transfer v. Rollover	May 15, 2025
Financial Planning – Have a Plan – Cash Flow, Housing Choices, Insurance Needs	May 19, 2025
Estate Planning – Lifetime documents, Powers of Attorney, health care directives, testamentary planning, transfer of assets, beneficiary designations	May 21, 2025
Transition to Retirement – Retirement phases, time allocation, retirement expectations, relationships, single life, work/volunteer/leisure activities	May 22, 2025
COURSE CODE:	**MAY2025CSRS**
REGISTRATION DEADLINE:	April 28, 2025

REGISTRATION FEE: $195.00 Per Person
Registration of Groups of 10 or more: $175.00 Per Person

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.

February 2025
July 2025

MID-CAREER PLANNING FOR FERS EMPLOYEES	Live Webinar Presentations *All Sessions Run 1:00–3:00 PM ET*	
	FEBRUARY	**JULY**
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	February 10, 2025	July 14, 2025
Social Security and Insurance Benefits – Social Security eligibility/ calculation/claiming strategies, FEHB, FEDVIP, FSAs, LTC, FEGLI	February 11, 2025	July 15, 2025
Financial Planning – Establishing financial goals, managing debt – credit cards and equity lines of credit, funding college, IRAs – Traditional and Roth	February 12, 2025	July 16, 2025
TSP for FERS Employees – Overview of the funds including the L-Fund, borrowing from the TSP, determining allocation between the funds, Roth TSP	February 13, 2025	July 17, 2025
COURSE CODE:	**FEB2025MCP**	**JUL2025MCP**
REGISTRATION DEADLINE:	Feb 3, 2025	July 7, 2025
REGISTRATION FEE: $125.00 Per Person **Registration of Groups of 10 or more: $110.00 Per Person**		

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.

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. 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 one (1) day prior to the start of the live presentation. A second email will be sent one (1) hour prior to the start of the presentation.

BILLING AND PAYMENT INFORMATION

Government purchase cards and SF-182 forms will be accepted as approved methods 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.