COURSE OUTLINE

NITP
National Institute of Transition Planning, Inc.

TITLE:	**Financial Planning for Federal Employees**
LENGTH:	1 day or approximately 6 hours of instruction time
AUDIENCE:	All Federal Employees

The following topics will be covered in this one-day seminar designed to provide the employee with an overview of financial goal setting:

- Establishing Financial Goals
- Developing a Budget
- Calculating Net Worth
- Managing Debt
- Investment Strategies
- Pros and Cons of Paying Down a Mortgage
- Thrift Savings Plan
    - Traditional vs. Roth
    - Contribution Limits
    - Investment Options - The Funds
    - Loan and Withdrawal Options
    - Options at Retirement or Separation
- Investments Beyond the TSP
- Understanding Mutual Funds
- Traditional and Roth IRAs
- Roth Conversions
- Funding College Education
- Insurance Planning
- Estate Planning Basics