



OPEN ENROLLMENT WEBINARS

FY 2025-2026

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

August 2025
September 2025
February 2026

Mid-Career Planning for FERS Employees

March 2026



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.

August 2025
September 2025
February 2026

PLANNING FOR RETIREMENT FOR FERS EMPLOYEES	Live Webinar Presentations <i>All Sessions Run 1:00–3:00 PM ET</i>		
	AUGUST '25	SEPTEMBER '25	FEBRUARY '26
FERS Federal Benefits - FERS and TransFERS, Eligibility, Creditable Service, Service Deposits, Basic retirement benefit computation	August 4, 2025	September 23, 2025	February 3, 2026
FERS Federal Benefits - FERS and TransFERS, Disability retirement, Retiree COLAs, choosing a date to retire, survivor benefit considerations, retirement timeline	August 6, 2025	September 24, 2025	February 4, 2026
Social Security & Medicare – Qualifying for a benefit, when to apply, widow(er) & family benefits, Medicare and how it works with FEHB	August 7, 2025	September 25, 2025	February 5, 2026
Federal Insurances – Now and in retirement - FEHB, FEGLI, FSAs, FEDVIP, FLTCIP	August 11, 2025	September 30, 2025	February 10, 2026
Financial Planning – Get Organized – Goals, Balance Sheet & Cash Flow, Budgeting, Debt Management	August 13, 2025	October 1, 2025	February 11, 2026
Financial Planning – TSP & IRAs – TSP Contributions, Fund Choices and Allocation, TSP at Retirement, IRAs – Roth v. Traditional, Roth Conversion, Transfer v. Rollover	August 14, 2025	October 2, 2025	February 12, 2026
Financial Planning – Have a Plan – Cash Flow, Housing Choices, Insurance Needs	August 18, 2025	October 7, 2025	February 17, 2026
Estate Planning – Lifetime documents, Powers of Attorney, health care directives, testamentary planning, transfer of assets, beneficiary designations	August 20, 2025	October 8, 2025	February 18, 2026
Transition to Retirement – Retirement phases, time allocation, retirement expectations, relationships, single life, work/volunteer/leisure activities	August 21, 2025	October 9, 2025	February 19, 2026
COURSE CODE:	AUG2025PFR	SEPT2025PFR	FEB2026PFR
REGISTRATION DEADLINE:	July 28, 2025	September 16, 2025	January 27, 2026
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.

March 2026

MID-CAREER PLANNING FOR FERS EMPLOYEES	Live Webinar Presentations <i>All Sessions Run 1:00–3:00 PM ET</i>
	MARCH
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	March 9, 2026
Social Security and Insurance Benefits – Social Security eligibility/calculation/claiming strategies, FEHB, FEDVIP, FSAs, FLTCIP, FEGLI	March 10, 2026
Financial Planning – Establishing financial goals, managing debt – credit cards and equity lines of credit, funding college, IRAs – Traditional and Roth	March 11, 2026
TSP for FERS Employees – Overview of the funds including the L-Fund, borrowing from the TSP, determining allocation between the funds, Roth TSP	March 12, 2026
COURSE CODE:	MAR2026MCP
REGISTRATION DEADLINE:	March 3, 2026
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.