



# OPEN ENROLLMENT WEBINARS FY 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

March 2026

May 2026

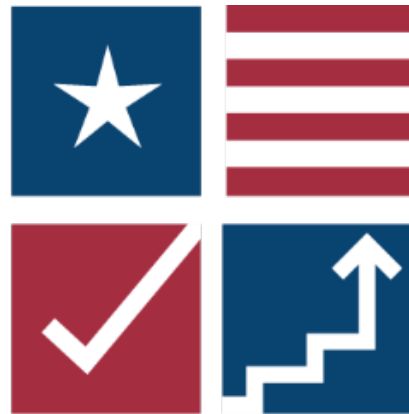
August 2026

September 2026

## Mid-Career Planning for FERS Employees

March 2026

July 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](mailto: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 2026**  
**May 2026**  
**August 2026**  
**September 2026**

PLANNING FOR RETIREMENT FOR FERS EMPLOYEES	Live Webinar Presentations <i>All Sessions Run 1:00–3:00 PM ET</i>			
	MARCH	MAY	AUGUST	SEPTEMBER
<b>FERS Federal Benefits - FERS and TransFERS, Eligibility, Creditable Service, Service Deposits, Basic retirement benefit computation</b>	March 9, 2026	May 4, 2026	August 3, 2026	September 14, 2026
<b>FERS Federal Benefits - FERS and TransFERS, Disability retirement, Retiree COLAs, choosing a date to retire, survivor benefit considerations, retirement timeline</b>	March 10, 2026	May 5, 2026	August 4, 2026	September 15, 2026
<b>Social Security &amp; Medicare – Qualifying for a benefit, when to apply, widow(er) &amp; family benefits, Medicare and how it works with FEHB</b>	March 11, 2026	May 7, 2026	August 6, 2026	September 17, 2026
<b>Federal Insurances – Now and in retirement - FEHB, FEGLI, FSAs, FEDVIP, FLTCIP</b>	March 12, 2026	May 11, 2026	August 10, 2026	September 21, 2026
<b>Financial Planning – Get Organized – Goals, Balance Sheet &amp; Cash Flow, Budgeting, Debt Management</b>	March 16, 2026	May 12, 2026	August 11, 2026	September 22, 2026
<b>Financial Planning – TSP &amp; IRAs – TSP Contributions, Fund Choices and Allocation, TSP at Retirement, IRAs – Roth v. Traditional, Roth Conversion, Transfer v. Rollover</b>	March 18, 2026	May 14, 2026	August 13, 2026	September 23, 2026
<b>Financial Planning – Have a Plan – Cash Flow, Housing Choices, Insurance Needs</b>	March 19, 2026	May 18, 2026	August 17, 2026	September 28, 2026
<b>Estate Planning – Lifetime documents, Powers of Attorney, health care directives, testamentary planning, transfer of assets, beneficiary designations</b>	March 23, 2026	May 19, 2026	August 18, 2026	September 29, 2026
<b>Transition to Retirement – Retirement phases, time allocation, retirement expectations, relationships, single life, work/volunteer/leisure activities</b>	March 25, 2026	May 21, 2026	August 20, 2026	October 1, 2026
<b>COURSE CODE:</b>	<b>MAR2026PFR</b>	<b>MAY2026PFR</b>	<b>AUG2026PFR</b>	<b>SEPT2026PFR</b>
<b>REGISTRATION DEADLINE:</b>	March 3, 2026	April 28, 2026	July 28, 2026	September 8, 2026
<b>REGISTRATION FEE: \$195.00 Per Person</b>				
<b>Registration of Groups of 10 or more: \$175.00 Per Person</b>				

# 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**  
**July 2026**

MID-CAREER PLANNING FOR FERS EMPLOYEES	Live Webinar Presentations <i>All Sessions Run 1:00–3:00 PM ET</i>	
	MARCH	JULY
<b>FERS Federal Benefits</b> – 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	July 13, 2026
<b>Social Security and Insurance Benefits</b> – Social Security eligibility/calculation/claiming strategies, FEHB, FEDVIP, FSAs, FLTCIP, FEGLI	March 10, 2026	July 14, 2026
<b>Financial Planning</b> – Establishing financial goals, managing debt – credit cards and equity lines of credit, funding college, IRAs – Traditional and Roth	March 11, 2026	July 15, 2026
<b>TSP for FERS Employees</b> – Overview of the funds including the L-Fund, borrowing from the TSP, determining allocation between the funds, Roth TSP	March 12, 2026	July 16, 2026
<b>COURSE CODE:</b>	<b>MAR2026MCP</b>	<b>JUL2026MCP</b>
<b>REGISTRATION DEADLINE:</b>	March 3, 2026	July 7, 2026
<b>REGISTRATION FEE: \$125.00 Per Person</b> <b>Registration of Groups of 10 or more: \$110.00 Per Person</b>		

### 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](mailto: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](mailto:accounting@nitpinc.com).

## **CONTACT US**

For further information or any questions, email us at [OpenEnrollment@nitpinc.com](mailto:OpenEnrollment@nitpinc.com).