



OPEN ENROLLMENT WEBINARS

FY 2027

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 2027

May 2027

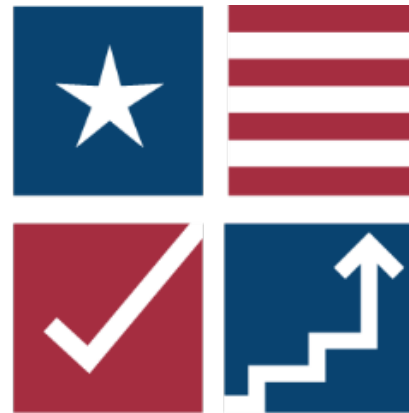
August 2027

September 2027

Mid-Career Planning for FERS Employees

March 2027

July 2027



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 2027
May 2027
August 2027
September 2027

PLANNING FOR RETIREMENT FOR FERS EMPLOYEES	Live Webinar Presentations <i>All Sessions Run 1:00–3:00 PM ET</i>			
	MARCH	MAY	AUGUST	SEPTEMBER
FERS Federal Benefits - FERS and TransFERS, Eligibility, Creditable Service, Civilian/Military Deposits, Basic retirement benefit computation	March 1, 2027	May 3, 2027	August 9, 2027	September 13, 2027
FERS Federal Benefits - FERS and TransFERS, Disability retirement, Retiree COLAs, choosing a date to retire, survivor benefit considerations, retirement timeline	March 2, 2027	May 4, 2027	August 10, 2027	September 14, 2027
Social Security & Medicare – Qualifying for a benefit, when to apply, widow(er) & family benefits, Medicare and how it works with FEHB	March 3, 2027	May 6, 2027	August 12, 2027	September 15, 2027
Federal Insurances – Now and in retirement - FEHB, FEGLI, FSAs, FEDVIP, FLCIP	March 8, 2027	May 10, 2027	August 16, 2027	September 20, 2027
Financial Planning – Get Organized – Goals, Balance Sheet & Cash Flow, Budgeting, Debt Management	March 9, 2027	May 11, 2027	August 17, 2027	September 21, 2027
Financial Planning – TSP & IRAs – TSP Contributions, Fund Choices and Allocation, TSP at Retirement, IRAs – Roth v. Traditional, Roth Conversion, Transfer v. Rollover	March 10, 2027	May 13, 2027	August 19, 2027	September 22, 2027
Financial Planning – Have a Plan – Cash Flow, Housing Choices, Insurance Needs	March 15, 2027	May 17, 2027	August 23, 2027	September 27, 2027
Estate Planning – Lifetime documents, Powers of Attorney, health care directives, testamentary planning, transfer of assets, beneficiary designations	March 16, 2027	May 18, 2027	August 24, 2027	September 28, 2027
Transition to Retirement – Retirement phases, time allocation, retirement expectations, relationships, single life, work/volunteer/leisure activities	March 17, 2027	May 20, 2027	August 26, 2027	September 29, 2027
COURSE CODE:	MAR2027PFR	MAY2027PFR	AUG2027PFR	SEP2027PFR
REGISTRATION DEADLINE:	February 23, 2027	April 27, 2027	August 3, 2027	September 7, 2027
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 2027
July 2027

MID-CAREER PLANNING FOR FERS EMPLOYEES	Live Webinar Presentations <i>All Sessions Run 1:00–3:00 PM ET</i>	
	MARCH	JULY
FERS Federal Benefits – Creditable service, Civilian/Military 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 22, 2027	July 19, 2027
Social Security and Insurance Benefits – Social Security eligibility/calculation/claiming strategies, FEHB, FEDVIP, FSAs, FLTCIP, FEGLI	March 23, 2027	July 20, 2027
Financial Planning – Establishing financial goals, managing debt – credit cards and equity lines of credit, funding college, IRAs – Traditional and Roth	March 24, 2027	July 21, 2027
TSP for FERS Employees – Overview of the funds including the L-Fund, borrowing from the TSP, determining allocation between the funds, Roth TSP	March 25, 2027	July 22, 2027
COURSE CODE:	MAR2027MCP	JUL2027MCP
REGISTRATION DEADLINE:	March 16, 2027	July 13, 2027
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.