



## Mid-Career Retirement Training Class Preparation

Hello, my name is Phyllis Conary. I will be facilitating the upcoming retirement course. Our goal is to help you fully understand your government benefits and determine what actions may be needed to adequately plan for retirement.

In order for you to gain the most from this class, we recommend reviewing some personal data before class and bringing the following items with you. ***Please note that these are suggestions only and all items are for your personal use.***

1. **A calculator (your phone will work) and a highlighter**
2. **Social Security Statement** – These have not been mailed out since 2010; however, you may obtain the same 4-page statement via the Social Security website. Simply go to [www.ssa.gov](http://www.ssa.gov) and choose “Get your Social Security statement online.” To obtain your statement, you will need to establish an account which requires having access to a former year W-2 (process takes 5-10 minutes).
3. **SF 50, Personnel Action Form** – Any fairly current form is adequate and will allow verification of service computation date, retirement system and details of life insurance coverage.
4. **Thrift Savings Plan** – Consider bringing a copy of a TSP statement which can also be printed out from the TSP website if you have your pin. *Note: If you don't have access to your pin, this is something you can do later.*

Regardless of whether or not you locate your statement, you are encouraged to experiment with the TSP calculators—you don't need to log into your account to use the calculators. Simply go to the website -- [www.tsp.gov](http://www.tsp.gov), choose Tools, then Calculators. Select the ***How Much Will My Savings Grow*** calculator. Try this using the amount you currently contribute. Then experiment with increasing your contribution between now and retirement or gaining an additional percentage return on your investments. This will give you an idea of the total savings available to you at retirement.

***Should you have any remaining questions after the class, you will be given a 30-day window to submit questions to me via email at [pconary@fedbenefitsolutions.com](mailto:pconary@fedbenefitsolutions.com). I'm looking forward to working with you soon.***