

**Federal Retirement Training**  
**What's in Your Retirement Portfolio?**

Tuesday January 29th, 2019

NOAA, Inouye Regional Center

*Sponsored by the Federal Retirement Thrift Investment Board, Security Exchange Commission, Office of Personnel Management, and Honolulu Federal Executive Board*



**7:30am: Registration**

**8:00am–12:15pm: Thrift Savings Plan/ Arvella Collins /Federal Retirement Thrift Investment Board**

*8:00-10:00am-TSP A-Z*

- Benefits of the TSP
- TSP Contributions
- Traditional vs Roth TSP
- TSP Core Funds & Lifecycle Funds
- Managing TSP Account

*(10:00-10:15am-break)*

*10:15am-12:15pm-TSP A-Z (Continued)*

- Pre-Separation Preparation
- In-Service Withdrawals
- Post-Service Withdrawals
- Death Benefits
- TSP Tips and Resources

**12:15-1:15pm: Lunch on your own**

**1:15-2:30pm Investing Outside the TSP/Carol Lally/ U.S Securities & Exchange Commission**

A few things to consider if you invest outside the TSP, including:

- Investment Professionals
- Fees and Expenses—and Why They Matter
- Common Products
- SEC Examination Findings and Enforcement Actions
- Resources for More Information

**2:30-2:45pm: Break**

***Tentative 2:45-4:00pm: Social Security Overview – Jane Yamamoto-Burigsay – Social Security Administration – Honolulu Office.***

- *Comparison of both retirement systems*
- *Eligibility requirements*
- *Survivor benefits*
- *When and How to Take Social Security*

**4:00pm: Wrap-Up and Adjourn**