

Federal Retirement Training
What's in Your Retirement Portfolio?

Wednesday January 30th, 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

8:00-9:15am 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

9:15-9:30am: Break

9:30-10:45am: 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*

11:00am-12:00pm: Lunch on your own

12:00pm–4:15pm: Thrift Savings Plan/ Arvella Collins /Federal Retirement Thrift Investment Board

12:00-2:00pm-TSP A to Z

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

(2:00-2:15pm-break)

2:15pm-4:15pm-TSP A to Z (continued)

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

4:15pm: Wrap-Up and Adjourn