



# **ACTION ITEMS:**

Prepare for Your Federal Retirement

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# 1

## **Federal Pension**

- Collect and review your SF50s
  - Estimate your pension & compare retirement dates
  - Start thinking about your income needs in retirement
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# 2

## **Thrift Savings Plan**

- Evaluate your Risk Tolerance
  - Review your allocations and consider making adjustments
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# 3

## **Social Security & Insurance**

- Use SSA.Gov to estimate your payout
- Thoroughly consider when to turn SS on
- Review your LES so you know what coverage you have and what it costs



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# How We Can Help

## Prepare for Your Federal Retirement

# 1

### Federal Retirement Consultation

During your complimentary consultation, we create a take-home Pension Estimate. This illustration compares the financial impact of your potential retirement dates.

# 2

### TSP Allocation Review

We offer a Risk Tolerance Analysis tools online OR as a part of your complementary consultation.

We also discuss your TSP allocations and offer suggestions based on your risk score and objectives.

# 3

### Social Security & Insurance

As part of your consultation, we review your Leave & Earnings Statement and discuss the insurance coverage you have, what it is costing you, and when to expect costs to increase.

Following your initial consultation, we can generate a Social Security Maximization report for you.

**[Scan an image below to Schedule your Consultation]**



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