

RV105 Schedule

# MID-CAREER RETIREMENT PLANNING SEMINAR (11/21/14)



Shultz NFATC  
FSI/TC/Career Transition Center  
US DEPARTMENT OF STATE

Career Transition Center Staff: Catherine McCormick, Mary Martinez, Kerri Cossean, Adam Verdecchia, Van Tabb, Courtney Turner

**JANUARY 13-14, 2015**

## Tuesday, January 13, 2015

*FSI Building C Room 3114 (above cafeteria)*

8:15 – 8:45

**REGISTRATION**

8:50- 9:00

**Welcome and Announcements**

9:00 – 11:45

**Financial Management**

**Karen Schaeffer, CFP**

*Schaeffer Financial LLC*

[www.schaefferfinancial.com](http://www.schaefferfinancial.com)

**LUNCH**

11:45 – 12:40

12:45 – 2:40

**Overview of Thrift Savings Plan**

**TBA**

*Federal Retirement Thrift Investment Board (FRITB)*

<http://www.frtib.gov/>

3:00 – 4:00

**Federal Long Term Care**

**Insurance Program**

**Jeannie Singleton**

*Long Term Care Partners, LLC*

[www.ltcfeds.com](http://www.ltcfeds.com)



**PLEASE REMEMBER TO:**

**--SIGN IN EACH MORNING AND AFTERNOON**

**-- PROVIDE AN ALTERNATE EMAIL ADDRESS IF YOU ARE IN TRANSIT, FOR THE FEEDBACK SURVEY**

**If your name is not on the sign in sheet**

*Check the FSI Registrar's Office*

*Building F, Room 1245*

*Phone (703) 302-7137 or 7144*

*Fax (703) 302-7152*

**Thank You**

## Wednesday, January 14, 2015

*FSI Building C Room 3114 (above cafeteria)*

**Go directly to your Annuity Session  
Breakout Room**

9:00 – 11:45

**Annuities and Benefits**

**for Civil Service and Foreign Service Retirees**

*(attend the session for your retirement plan)*

**Civil Service Annuities FERS**

**TBA**

**Foreign Service Annuities FSPS**

**TBA**

**HR/RET, US Dept. of State**

<http://intranet.hr.state.sbu/offices/RET/Pages/default.asp>

**LUNCH**

11:45 – 12:45

*Return to C-3114*

1:00 – 4:00

**Fundamental Aspects of**

**Estate Planning**

**Megan Schaeffer**

*JD, Megan Schaeffer*

<http://www.pasternakfidis.com>

**Please provide feedback on the seminar by completing a brief survey. A link will be sent via email to all participants.**



DOS –Course materials are located on the SharePoint site:

<http://fsi.m.state.sbu/sites/tc/CTC/MCRPS/default.aspx>

**OTHER AGENCIES: check your email for materials.**

