



FEDERAL EMPLOYEE RETIREMENT BENEFITS CONSULTATION ROADMAP



Introduction

- Your Goals, Needs and Concerns
- What Are Your Objectives?
 - Questionnaire
- What are Your Current Challenges?
- What Have You Done So Far?
- Is This a Priority for You?

Discovery

- Questionnaire Review
- LES/Paystub Review
- TSP Statement Review
- How Does it all Fit Together?

Workbook

- Identify Possible Problems
- Personalized Benefits Review
 - FEGLI
 - Disability
 - FERS (Pension)
 - TSP
- Identify any Possible Issues
- Summary of Benefits and Any Problem Areas

Take Action

- Agree on Issues (If There are Any)
- Go Over Possible Solutions
- Set Up a Personalized Plan
- Fill Out Application(s) – online
- **Do you Need a Retirement Plan?**