

Training Course Report

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The contents of the training event record you selected are displayed below:

SHORT TITLE: RETIREMENT SUPPLEMENTAL INFORMATION: SOCIAL SECURITY AND FINANCIAL MANAGEMENT

LONG TITLE: RETIREMENT SUPPLEMENTAL INFORMATION: SOCIAL SECURITY AND FINANCIAL MANAGEMENT

LOCATION: FEDERAL FIRE DEPARTMENT HQ, PEARL HARBOR

REGION: PACIFIC

DATE START: 11/20/2008

DATE END: 11/20/2008

TIME START: 1:00:00 PM TIME END: 3:30:00 PM

NOMINATION DEADLINE: 10/20/2008

COST: \$0.00

COURSE DESCRIPTION:

This two-part course is an excellent supplement to the retirement planning courses for CSRS or FERS. This course covers aspects of retirement financial planning beyond the features of the Federal employee retirement benefits programs. These planning tools and information will be useful to Federal civilian employees who are covered by either the CSRS or the FERS retirement systems.

SOCIAL SECURITY ADMINISTRATION (1:00 – 2:00 pm)

We invite you to attend this training seminar regarding the Social Security benefits program to learn how your Federal retirement benefits relate to Social Security. Jane Yamamoto-Burigsay, Public Affairs Specialist from the Social Security Administration, will be presenting various topics of discussion to include: Medicare, Supplemental Security Income, Cost-of-Living Adjustments, Social Security Credits, Eligibility, Benefit Calculations, Windfall Elimination Provision, Government Pension Offset, Survivors Benefits, Disability & Survivors Insurance, and Social Security Statement.

FINANCIAL MANAGEMENT – RETIREMENT PLAN DISTRIBUTIONS (2:00 – 3:30pm)

The retirement plan distribution and investment decisions you make when you retire can impact your financial situation for the rest of your life. Will your savings provide the money you need to enjoy your retirement, or will daily living expenses consume most of your income? When you understand your options, you can avoid costly mistakes and make informed decisions that can help preserve your funds to last throughout retirement.

Join us for an educational workshop where you'll learn strategies for:

- Choosing an appropriate retirement plan distribution method
- Rolling funds into an IRA for continued tax deferral
- Understanding retirement plan distribution rules

- Investing your retirement assets to make them work for you
- Leaving a lasting legacy using a stretch IRA

When you attend the workshop, you will receive a full-color, 20-page workbook on retirement plan distributions. This invaluable resource contains essential information, exercises, and questions that can help you assess your current situation and make sound financial decisions with confidence. Perhaps best of all, you'll be eligible for the complimentary consultation offered to all workshop participants.

ELIGIBILITY: None (All Federal civilian retirement eligibles are highly encouraged to attend. Spouses may also attend, with advance notice, provided space is available).

ACTION:

To register, FAX or mail a copy of the approved and properly executed SF-182 to the Human Resources Service Center, Pacific, REGISTRAR, Training Department, Code 30, 178 Main Street, Bldg. 499, Honolulu, HI 96818-4048 by the nomination deadline. Confirmation letters will be sent by e-mail. Please provide Point of Contact's name, phone number and e-mail address. *(Insert in SF-182, Section B, Block 18)*

VENDOR:

Social Security Administration and Navy Federal Investments & Insurance *(Insert in SF-182, Section B, Block 1a)*

TRAINING SITE:

Federal Fire Department HQ, 650 Center Drive, Bldg. 284, Ehahi Room, Pearl Harbor, HI 96860 *(Insert in SF-182, Section B, Block 1b)*

Web site link for direction and Map for Federal Fire Department

FOR FURTHER INFORMATION:

HRSC PACIFIC, Training Department
Telephone: (808) 474-0025, FAX (808) 471-8452
REGISTRAR: Jane Ebesu, Ext. 306
Course Manager: Jo Barrientos, Ext: 302

SPONSOR: Hawaii Joint Training Board

SAID: 87000 *(Insert in SF-182, Section B, Block 19)*

[CLICK HERE](#) for more information concerning nomination, selection/nonselection, and payment procedures.