# FEDERAL EMPLOYEE RETIREMENT

MFG SINCE 1963

## FIND OUT WHAT OUR COMPREHENSIVE PLANNING INCLUDES.

| Federal Retirement Planning | Federal Annuity Strategy | Thrift Saving & Investments | IRAs & RMDs | Tax Planning | Social Security & Medicare | Financial Estate & Legacy |
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| CSRS, CSRS-Offset & FERS | Service Computation Date | Review of Income Sources | IRA Contributions | Tax Impact Analysis | Soc. Sec. Basics & FRA | Beneficiary Planning & Review |
| Federal Benefits Data Collection | Optimum Date to Max Annuity | 401(k) Management | Roth IRAs | ROTH Conversions | Coordinating Spousal Benefits | Asset Protection |
| Annual Leave & Earnings | Military Service & SCD | Income Withdrawal Strategies | Rollovers | Tax Loss Harvesting | Benefit Claiming Strategies | Life & LTC Insurance Strategies |
| Federal Benefits Report | High - 5 Computation | Pension Distribution Strategies | Penalty-Free Withdrawals | Managing Taxes | Medicare Strategy Options | Charitable Giving Strategies |
| Personal Statement of Benefits | Pension Max Strategies | Income Sustainability Analysis | SEP IRAs & SIMPLE IRAs | Retirement Plan Analysis | Parts A, B, C, & D Medicare | Estate Documents Overview |
| Fed Benefit Analysis Comparison | Service Buy-Back Analysis | Cash Flow Projections | RMD Distribution Strategies | Tax Advantaged Investments | Applying for Benefits - Avoiding Penalties | Titling of Assets |
| Team Based Planning Process | Spouse & Federal Pension | Inheritance Planning | Qualified Charitable Distributions | Cost-Basis Review/Strategy | Medicare Supplements & Advantage Plans | Tax-Efficient Asset Transfers |