Retirement Resource Checklist

[**www.yourfederaledge.com**](http://www.yourfederaledge.com)

**Thrift Savings Program** (TSP.gov)

* **TSP Elective Deferral Calculator**

<https://www.tsp.gov/PlanningTools/Calculators/retirementCalculator.html>

FERS employees who want to maximize agency matching contributions. Helps to avoid reaching IRS Elective Deferral Limit before end of year, and losing agency matching contributions on remaining pay periods.

* [**TSP-1**](https://www.tsp.gov/PDF/formspubs/tsp-1.pdf) To start, stop or change contributions to TSP
* [**TSP-1-C**](https://www.tsp.gov/PDF/formspubs/tsp-1-c.pdf)  For participants age 50 or older to start, stop, or change catch-up contributions to TSP
* [**TSP-3**](https://www.tsp.gov/PDF/formspubs/tsp-3.pdf)  TSP Designations of Beneficiary
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**Social Security Administrations** (SSA.gov)

* [**Windfall Elimination Provision**](https://www.socialsecurity.gov/pubs/EN-05-10045.pdf) (WEP) [www.ssa.gov/gpo-wep/](http://www.ssa.gov/gpo-wep/)

CSRS Social Security benefits may be reduced by Windfall Elimination Provision

* [**Government Pension Offset**](https://www.socialsecurity.gov/pubs/EN-05-10007.pdf) (GPO)

[www.ssa.gov/gpo-wep/](http://www.ssa.gov/gpo-wep/)

CSRS Social Security widow(er) benefit may be reduced by GPO

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**General Resources**

* **Federal Employees Almanac**

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

* [www.yourfederaledge.com](http://www.yourfederaledge.com)
* [www.fedsmith.com](http://www.fedsmith.com)

**Internal Revenue Source** (IRS.gov)

* [**Publication 590-A**](https://www.irs.gov/pub/irs-pdf/p590a.pdf)

Individual Retirements Arrangements IRAs

* [**Publication** **575**](https://www.irs.gov/pub/irs-pdf/p575.pdf)

Pension and Annuity Income

* [**Publication** **721**](https://www.irs.gov/pub/irs-pdf/p721.pdf)

Tax Guide to U.S. Civil Service Retirement and

Benefits. Includes CSRS, FERS and TSP

**U.S. Office of Personnel Management** (OPM.gov)

**Federal Group Life Insurance** (FEGLI)

* [SF 2823 FEGLI](https://www.opm.gov/forms/pdf_fill/sf2823.pdf) Designation of Beneficiary
* [SF 2817 FEGLI](https://www.opm.gov/forms/pdf_fill/sf2817.pdf) Life Insurance Election
* [SF 2818](https://www.opm.gov/forms/pdf_fill/sf2818.pdf) FEGLI Continuation of Life

Insurance as an Annuitant

**General Forms for Federal Employees**

* [SF 1152](https://www.opm.gov/forms/pdf_fill/sf1152.pdf) Designation of Beneficiary Unpaid Compensation of Deceased Federal Employee

**Federal Employees Retirement System** (FERS)

* [SF 3107](https://www.opm.gov/forms/pdf_fill/sf3107.pdf) FERS Application for Immediate Retirement
* [SF 3108](https://www.opm.gov/forms/pdf_fill/sf3108.pdf) FERS Application to make Service

Credit Payment

* [SF 3102](https://www.opm.gov/forms/pdf_fill/sf3102.pdf) FERS Designation of Beneficiary

**Civil Service Retirement System** (CSRS)

* [SF 2801](https://www.opm.gov/forms/pdf_fill/sf2801.pdf) CSRS Application for Immediate Retirement
* [SF 2803](https://www.opm.gov/forms/pdf_fill/sf-2803.pdf) CSRS Application to Make Deposit or Redeposit
* [SF 2808](https://www.opm.gov/forms/pdf_fill/sf2808.pdf) CSRS Designation of Beneficiary
* SF 2804A CSRS Voluntary Contribution Information
* [SF 2804](https://www.opm.gov/forms/pdf_fill/sf2804.pdf) CSRS Application to Make

Voluntary Contribution

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