Items Needed for Federal Benefit Analysis

- Latest Social Security Statement
  (go on-line to www.ssa.gov, you'll have to create a User name and password to get it)
  Warning – can get locked for 24 hrs and/or must call Social Security if you answer questions wrong in creating your account.
- Latest Earnings and Leave Statement
- Check with HR/employee express for FEGLI options.
- Latest TSP statement. Warning – if you do not have password for TSP it takes min. of 10 days to get one.
- If you have any temporary time, part-time, break in service, military – try to have these dates and approximate pay (Download you SF50's from personnel file)

Items or Questions to determine how to best use your Federal Benefits in YOUR LIFE!

- Retirement Dreams, goals, objectives
- Legacy goals
- Risk Tolerance – how much are you willing to risk on scale to 1 (low) to 10 (high)
- Liquidity needs – emergency funds
- Any financial or brokerage statements
- Insurance statements and/or contracts
- Income needs now and in retirement (your budget)
- Debt – type of debt, how much, interest rate, minimum payments, current payments, etc.
- General Health History and Needs
- Legal Docs - Do you have these: POA, will, Living wills, trusts?
- Any other special needs

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