

Summary Financial Education Plan Data Elements

Agency:

Headquarters Benefits Officer:

Contact Information:

Year of Plan:

Content	Yes	No
Title 5 Retirements (CSRS, FERS).....		
FEHB.....		
FEGLI.....		
TSP.....		
Other specific Benefits.....		
Social Security and Medicare.....		
Estate Planning.....		
Tax Planning Strategies.....		
Child Education Planning		
Eldercare Planning.....		
Long Term Care Insurance.....		
Self-initiated estimates, via calculators.....		
MyRA.....		

Other content covered:

Delivery

Yes

No

- Pre Retirement counseling.....
- Pre Retirement Seminars.....
- 1 on1 counseling (upon request).....
- Benefits Fairs.....
- Lunch and Learn.....
- Targeted Communications.....
- Email Blasts.....
- Web based communications.....
- Posters/Flyers.....
- Pamphlets.....
- Online calculators.....
- Work with Labor organizations and Unions.....
- Specific Training for Benefits Personnel.....

Other delivery methods:

Evaluation

Yes

No

- Surveys.....
- Analysis of Utilization of Services.....
- TSP Participation/Contribution Rates.....
- Evaluate Benefits Practitioners.....

Other Evaluations performed:

Sustainability

Yes

No

- Analysis of Survey results.....
- Develop Strategies for Increased Utilization of Services.....
- Increasing Awareness of Services.....
- Enhancements to Services based on Surveys.....
- Refresher training for HR Practitioners.....
- Develop Regulations/ Training Materials.....

Other Sustainability tools/practices: