



HELPFUL HINTS FOR DATA COLLECTION FORM COMPLETION

As part of the NATCA retirement workshops, 4square Financial Partners has offered to provide a personalized estimated benefit analysis for your reference during the workshop to help make the curriculum more applicable and relevant to you. To prepare this personalized estimated benefit analysis, we will need to collect data from you. **We must receive this data no later than 2 weeks prior to the workshop for which you are registered.** If your data is submitted before the deadline for your workshop, we will have your statement ready for you at the beginning of the session. Your data will be handled in a secure format, but to maintain privacy please feel free to black out items you would not want to be viewed – especially Social Security numbers (always on DD214), addresses and any other personal data . Your data will be reviewed by several individuals in our facility and, for complicated cases, by offsite specialists for input and analysis. The information presented will be as close an estimate as possible, subject to the accuracy and completeness of information provided to us. The analysis is provided AS IS without warranties of any kind. You should not base your financial decisions solely on the estimates in the report. *It is always recommended that you consult with the Office of Personnel Management (OPM) 1-888 767-6738 for a final determination of your benefits.*

Page 1: Please record your personal information as complete as possible. Address is not needed if you care to omit. Do not forget to put your Retirement Service Computation Date (RCSD). It can be found on your Leave and Earnings Statement. Check the retirement system you are under and your desired retirement date.

Page 2: This data captured on this page can help increase your estimated retirement benefit by using past military service, buying time that you may have completed as a part-time or temporary federal employee -- even under another agency. If you had a break in service you can capture that time and pay it back if, for example, you withdrew your funds in the past and if you would like to use your sick time to increase your years of service. Also on this page you record your current annual salary. For retirement calculations, only your base salary and locale pay are used in the calculation. You can find this on your Leave and Earnings Statement under your salary information.

Page 3: Please enter your best guess on base salary increases, over time and the annual cost of living increase while in retirement. If you leave this blank we will default to 1.5%. Please enter the percentage for survivor benefit you choose to illustrate. For CSRS you can leave a minimum of \$3600 per year to a maximum of 55%. For FERS, you have just three choices: 0%, 25%, or 50%. You must leave some minimum to continue FEHBP for surviving spouses. Please enter your estimates of Social Security. If you wish, you can also send a copy of the statement for ease. Be sure to black out the address and any Social Security Number for security purposes.

The Thrift savings plan has a few entries: Where are your funds now, where do your new contributions go, how much are you putting in, at what rate would you like to see it grow between now and retirement (we will default to a 3% overall rate if you omit) and how would you wish to see these funds used once retired. If you are unsure, just check "Lump Sum". If you would like to have income calculated, check one of the boxes at the bottom of the page. If you are unsure, please just submit a current copy of your TSP statement along with this form and we can collect all the data directly from your statement.

Page 4: Please enter your FEGLI elections. If you are unsure, we can take it from your Leave and Earnings Statement and enter the data. Elect what your option would be at retirement: Take all FEGLI, take no FEGLI or take a reduction. Enter your current FEHBP premium and an annual cost of living. If you are unsure we commonly see between 5%-8% increases per year.

Page 5: Please enter your Long Term Care elections if you chose to purchase the Federal program. Feel free to add any comments that might help us understand your data; and if you did experience a divorce, please note it as we will remind you of the procedure to file proper paper work to the appropriate areas for recording and filing. Improper filing of your court order to split your retirement benefits (Qualified Domestic Relations Order- QDRO) can hold up your retirement benefit payments.

Please forward the completed 5-page information form, along with any statements or other supporting documents (with personal information redacted). Your personalized retirement estimated benefits statement will be delivered to you at your seminar workshop.