



FEE SCHEDULE **(INDIVIDUALS ONLY)**

CHOICE I. **Retirement/Benefit Projections Only**

\$350.00*

This is a common selection/request for individuals 3 or more Years out from Retirement. Based upon the information you would be asked to provide, you in turn will receive multiple Projections illustrating various ages/scenarios.

Each Projection is 28 – 33 Pages and depicts from the current Year up to then transitioning into Retirement and the Years beyond until Age 90.

The following major areas are illustrated in detail:

- CSRS/CSRS Offset/FERS/FERS Changeover Annuity
- FERS Retirement/Supplement
- Traditional/ROTH Thrift Savings Growth/Payout Options
- Federal Employees Health Benefits
- Federal Employees Group Life
- Medical Savings/Health Savings Account
- Military/Other Retirement
- Taxes
- Un-used Sick Leave Added Value
- Annual Leave Lump Sum Payout
- Military Deposits for Civilian Service
- Taxes

MANY INDIVIDUALS WILL SEE THE TIME/MONEY VALUE OF STAYING LONGER.....OTHERS WILL BE COMFORTABLE TO RETIRE SOONER THAN THEY THOUGHT. CURRENT "AGENCY" ILLUSTRATIONS/PROJECTIONS DO NOT "BLEND" ALL RETIREMENT BENEFITS/INCOME INTO ONE VIEW.

Choice 2. Retirement Documents Preparation & Processing

\$600.00*

This is the common choice for individuals less than 3 Years from anticipated Retirement.

This includes all items in CHOICE 1. Additionally, we will prepare all required documents for your review/signature/submission. As important is having your “FINAL NUMBERS” calculated so any errors in amounts calculated by your Agency or OPM are recognized and corrected if in error.

Our Work is completed when your Retirement is “Finalized” by OPM.

***Stated Fees may be more (Particularly Choice 2) for the following more common issues:**

Retirement Division (i.e. Divorce)

Medical/Disability Retirement

Preparation/Participating in Mediation/Court Proceedings

Preparing Information for Attorney's/Accountants/Forensic Economists

If you select CHOICE 1, and decide a Retirement Date within 90 Days of Projections being prepared, RETIREMENT PREPARATION is only the additional \$200.00

Fees are payable in advance by Credit/Debit Card, Check, or Pay Pal

For More Information Contact

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