SFG Federal

689 Rivendell Blvd
Osprey, FL 34238
Bus: (941) 927-1050
Fax: (941) 927-1070

RETIREMENT WORKSHOPS

SFG Federal is contracted with the Government to teach educational classes on retirement benefits for HR Departments and Associations. SFG Federal is dedicated to helping both Civil Service and Military employees understand their financial options amidst the constantly evolving rules and regulations, helping you get the most out of your benefits. We have provided over 100 Classes, Workshops and Online-Webinars.

SFG Federal Advisors are Chartered Federal Employee Benefits Consultants (ChFEBC) and prides themselves on a unique, comprehensive and educational approach to financial planning. Individuals are encouraged to exercise their right and take advantage the personalized level of service they are entitled to receive as federal employees.

EDUCATIONAL WORKSHOPS

SFG Federal specializes in offering Educational Workshops to Federal Agencies in helping them with their Federal Employees retirement preparation:

Workshops are open to all federal employees, ranging from new-hire to retirement-eligible. Supervisors can educate their staffs on the financial issues with the off-site briefing as well as offering employees a personalized packet. Sarasota Financial Group has conducted civil workshops for numerous top government agencies

Here is some information on how SFG Federal can bring value to you and your group. As you might already know, SFG Federal offers through the Human Resources departments in the Federal Government to provide Retirement Workshops. Over the last 7 years we have conducted over 100 Workshops, plus a whole lot of Go-To-Webinars. We are very flexible and can even set up evening briefings to make it available to almost everyone at your location. For most of the facilities we have set it up in the following way:

<u>Option 1: Retirement Briefings</u>
9:00 – 12:00 am – 1:00 – 4:00pm

1. CSRS & FERS regular & Special Provisions
2. Offset
3. Pension calculations,
4. Survivor benefits,
5. Social security implications
6. FERS supplement
7. TSP

Option 2: Exit Strategies
9:00 -12:00am & 1:00-4:00pm
1. Retirement Planning Basics
2. Manage Investments for Lifetime Income
3. Social Security Planning
4. Survivor / Estate Planning
5. CSRS/FERS Retirement Paperwork

Option 3: Lunch and Learns (1 to 1 ½ hour)
1. Break down the full retirement seminar into 3 parts.
2. 5 Mistakes in Retirement
3. Retirement Income Planning
   (Lunch and Learns that can be custom designed to fit your time schedule and location)

We offer all seminar participants the complimentary Federal Benefit Analysis, which is a detailed report of their benefits to help them understand and interpret how these might affect their financial future. (See SBA-FERS-Regular-SAMPLE). The Benefit Analysis plan combines their federal benefits along with any other income and expenses and is tailored specifically to their financial goals and a Sample Benefit Analysis is used as a case study during our seminars.

Thanks for all your time and effort and I look forward to speaking with you again,

Best Regards,

Bill Morris

William S. Morris, ChFEBC
Sarasota Financial Group, Inc.
689 Rivendell Blvd.
Osprey, FL 34229
941-927-1050 Ph.
941-927-1070 Fx.
Bill@SFGFederal.com
www.SFGFederal.com

GOVERNMENT CONTRACTING
DUNS Number: 128940819
CAGE Number: 84R68