

# Confidential Federal Employee Benefits Analysis



Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Spouse: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Retirement Plan (circle one): FERS \*\* CSRS \*\* CSRS Offset \*\* FERS Transfer

If Transfer or Offset, date of such \_\_\_\_\_

Service Computation Date \_\_\_\_\_

Desired Retirement Date \_\_\_\_\_

Annual Base Pay + Locality \_\_\_\_\_

Sick Leave Accrued \_\_\_\_\_

Sick Leave-Hours saved per PP \_\_\_\_\_

Military Time? Y/N - Retirement? Y/N - Bought Back? Y/N  
Part Time Service? Y/N - Temp Time? Y/N - Term Time? Y/N  
Is your Service Computation Date reflective of above service? Y/N

Breaks in Service? Y/N - Did you make a withdrawal? Y/N - Did you pay it back? Y/N

Spouse Survivorship Annuity Election: 100% 50% None Other \_\_\_\_\_

How would you describe your Health? Excellent Average Poor

How would you describe your Spouses Health? Excellent Average Poor

Do you use tobacco products? Y/N - Do You Have Long Term Care Coverage? Y/N

Do You Have Life Insurance - Other Than FEGLI? Y/N (if yes) Type of Coverage: Term / Permanent

What % or \$ amount are you contributing to TSP? \_\_\_\_\_

If you could, or are eligible, would you contribute more? \_\_\_\_\_

Do you have any retirement savings plans outside of your TSP? (IRA's, CD's, Annuities) \_\_\_\_\_

Planned Use of TSP Monies in Retirement: Supplement Income / Transfer to IRA / Annuitize / No Plan

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

FSA County Office \_\_\_\_\_ Email \_\_\_\_\_

Work Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_

**Please send this form and the following items listed below to: [info@jminsuredirect.com](mailto:info@jminsuredirect.com)**

*(Please type "SECURE" in the email subject line to encrypt your email.)*

1. Your most recent Personal Benefits Statement
2. Your most recent Leave and Earnings Statement
3. Your most recent TSP Statement
4. Your most recent Social Security Statement

Internal Purposes Only:

Serial No: \_\_\_\_\_

Questions?? Please Call Us at 1-800-330-6223 and ask for Trevor Gartner, JM Team Leader