



Thrift Savings Plan BULLETIN

for Service TSP Representatives

Subject: Service Responsibilities When Thrift Savings Plan Participants Separate From the Uniformed Services

Date: July 16, 2002

When a Thrift Savings Plan (TSP) participant separates from the uniformed services, service representatives must give the participant a TSP withdrawal package and submit an employee data record (06-Record) to the TSP record keeper to reflect the separation. In addition, service representatives should explain the TSP withdrawal options to the participant.

This bulletin lists the materials that should be included in the TSP withdrawal package after the new record keeping system is implemented in September 2002. TSP Bulletin 01-U-3, dated July 19, 2001, contains information about submitting employee data records to the TSP record keeper.

I. Withdrawal Package

The TSP withdrawal package must include the following materials:

- The booklet *Withdrawing Your TSP Account After Leaving Federal Service*
- The booklet *TSP Annuities*
- Form TSP-U-70, Request for Full Withdrawal
- Form TSP-U-77, Request for Partial Withdrawal When Separated
- The notice "Important Tax Information About Payments From Your TSP Account"

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Inquiries: Questions concerning this bulletin should be directed to the Federal Retirement Thrift Investment Board at **202-942-1460**.

Chapter: This bulletin may be filed in Chapter 8, Withdrawal Program.

Supersedes: When the new record keeping system is implemented, this bulletin supersedes TSP Bulletin 02-U-6, Service Responsibilities When Thrift Savings Plan Participants Separate From the Uniformed Services, dated March 1, 2002.

II. Withdrawal Options

The TSP withdrawal options available to participants who separate from the uniformed services are discussed in the TSP withdrawal booklet and the Federal Retirement Thrift Investment Board's regulations at 5 C.F.R. part 1650.

To learn more about the withdrawal program and options, service representatives may also want to attend the free training offered by the Board. Specifically, the Board offers a one-day course on the TSP withdrawal program and another one-day course on all aspects of the TSP, including the withdrawal program. See TSP Bulletin 01-U-12, dated December 3, 2001, for the 2002 training schedule.

A handwritten signature in cursive script that reads "Pamela-Jeanne Moran".

PAMELA-JEANNE MORAN
Deputy Director
Office of External Affairs