



Thrift Savings Plan BULLETIN

for Agency TSP Representatives

Subject: TSP Materials for the New Record Keeping System

Date: June 18, 2003

On June 16, 2003, the Federal Retirement Thrift Investment Board announced the implementation of the new Thrift Savings Plan (TSP) record keeping system. Because the new system includes a multitude of new benefits and enhancements, all of the TSP publications and forms have been revised. Older versions are obsolete and should be destroyed.

The attached [table](#) provides a list of the primary publications and forms and their shipping schedule (if any). Column 1 of the table lists the revised materials, column 2 indicates the supply that will be sent to the agencies as a percentage of their population, and column 3 indicates the date that the materials should be received by the central distribution points.

In response to requests from many agencies, we have minimized the volume of primary materials being distributed and, in some cases, opted to allow the agencies to order the publications and forms based on their needs. Thus, the schedule does not include materials such as the TSP At a Glance, the more specialized publications (e.g., the court order booklet), and the leaflets (e.g., Start Early). These items, as well as the more popular ones, can be ordered by the designated Department or agency representative using Form TSP-40, Thrift Savings Plan Order Form. In assessing your needs, please note that all of the publications and forms (except Form TSP-50, Investment Allocation) can be downloaded from the TSP Web site. Furthermore, because participants now have the ability to request, and, in some cases, complete, loans and withdrawals (as well as contribution allocations and interfund transfers) on the Web site, we are encouraging them to use the Web site instead of sending forms to the TSP record keeper.

(continued on next page)

Inquiries: Questions about the materials for the new system should be directed to the Board at **(202) 942-1460**. Questions about the distribution of these materials should be directed to the Board at **(202) 942-1673**.

Chapter: This bulletin may be filed in Chapter 12, Resources.

Supersedes: This bulletin supersedes TSP Bulletin 02-17, Thrift Savings Plan Materials for the New Record Keeping System, dated June 25, 2002.

We are issuing separate bulletins to address some of the individual forms that have been radically changed, e.g., the new self-certified Financial Hardship In-Service Withdrawal Request. In the meantime, however, this bulletin will give you the information you will need to manage your TSP publications inventory.

A handwritten signature in black ink, reading "Pamela-Jeanne Moran". The signature is written in a cursive, flowing style.

PAMELA-JEANNE MORAN
Deputy Director
Office of External Affairs

Attachment: Schedule of TSP Materials for the New Record Keeping System

**Schedule of TSP Materials for the New Record Keeping System
(Civilian)**

Booklets			
Number/Title/Version Date	Distribution to Agencies	Date Distribution Should be Received	Date Product Available from Web Site
TSPBK05, <i>TSP Annuities</i> , 6/2003	10%	mid-July	6/16/2003
TSPBK11, <i>Information About Court Orders</i> , 6/2003	N/A	N/A	6/16/2003
TSPBK03, <i>Guide to TSP Investments</i> , 6/2003	N/A	N/A	6/16/2003
TSPBK04, <i>Loan Program</i> , 8/2002	15%	mid-July	6/16/2003
TSPBK02, <i>Withdrawing Your TSP Account After Leaving Federal Service</i> , 8/2002	20%	mid-July	6/16/2003
TSPBK12, <i>In-Service Withdrawals</i> , 6/2003	20%	mid-July	6/16/2003
Forms			
TSP-3, <i>Designation of Beneficiary</i> , 8/2002	10%	mid-July	6/16/2003
TSP-9, <i>Change of Address for Separated Participant</i> , 8/2002	N/A	N/A	6/16/2003
TSP-16, <i>Exception to Spousal Requirements</i> , 8/2002	N/A	N/A	6/16/2003
TSP-17, <i>Information Relating to Deceased Participant</i> , 8/2002	N/A	N/A	6/16/2003
TSP-20, <i>Loan Application</i> , 8/2002	10%	6/1/2003	6/16/2003
TSP-50, <i>Investment Allocation</i> , 8/2002	10%	6/1/2003	N/A
TSP-60, <i>Request for a Transfer Into the TSP</i> , 6/2003	N/A	N/A	6/16/2003

TSP-65, Request to Combine Uniformed Services and Civilian TSP Accounts, 8/2002	N/A	N/A	6/16/2003
TSP-70, Request for Full Withdrawal, 8/2002	20%	mid-July	6/16/2003
TSP-75, Age-Based In-Service Withdrawal Request, 8/2002	N/A	N/A	6/16/2003
TSP-76, Financial Hardship In-Service Withdrawal Request, 8/2002	N/A	N/A	6/16/2003
TSP-77, Request for Partial Withdrawal, 8/2002	30%	mid-July	6/16/2003