



Benefits Administration Letter

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Subject: Guide to Financial Education Fairs

Introduction

The Thrift Savings Plan Open Elections Act of 2004 (Public Law 108-469) required the Office of Personnel Management (OPM) to develop and implement a retirement financial literacy and education strategy for Federal employees as part of the retirement training offered by OPM under 5 U.S.C. 8350. In October 2005, OPM released the strategy. The strategy outlines the roles of OPM, employing agencies, and employees. One of OPM's responsibilities is to serve as a capacity builder. This means that we will provide the training and tools to agency benefits officers so that they can help their employees understand their benefits and identify their financial education needs. We will also develop model programs that benefits officers can use in their own agencies. As part of this program, OPM developed a *How To* guidebook for individual agencies or groups of agencies wishing to sponsor and conduct their own fairs.

This Benefits Administration Letter (BAL) transmits a guide to planning financial education fairs. The purpose of the guide is to provide you with instructions on how to plan a successful financial education fair and provide guidance on the process. The guide includes a planning checklist, a list of potential workshop topics, suggested publicity and promotion ideas, and fair evaluation forms. Any questions on the guide can be addressed by emailing the Benefits Officers Training and Development Group at benefits@opm.gov or calling 202-606-0788.

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Attachment: Guide to Financial Education Fairs