

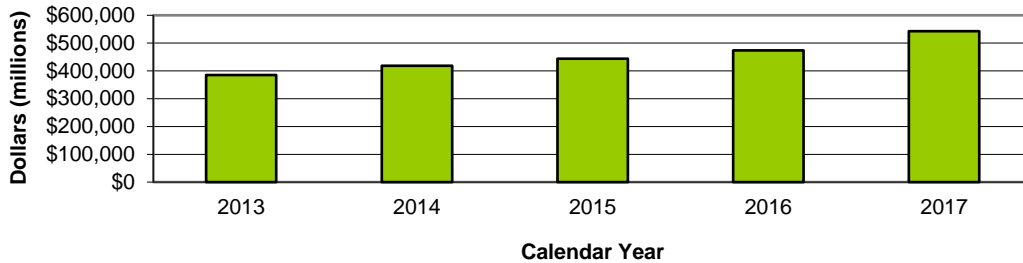
# Thrift Savings Fund Statistics

April 2018

## Highlights

The FERS Participation rate continues to climb, reaching 90.7% from approx. 83% when auto-enrollment started in 2010. The Plan experienced a spike in withdrawals and loans with a 13% increase in April. We continue to see significant improvements in our phone call service level with 83.7% calls answered in 20 seconds and have decreased our abandonment rate to 1.9% exceeding our service level of 2%. We are well on our way to achieving a sustained period of meeting and exceeding the service level requirements in all contact center categories.

## Historic Plan Balances (in millions)



## Plan Balance

## Roth

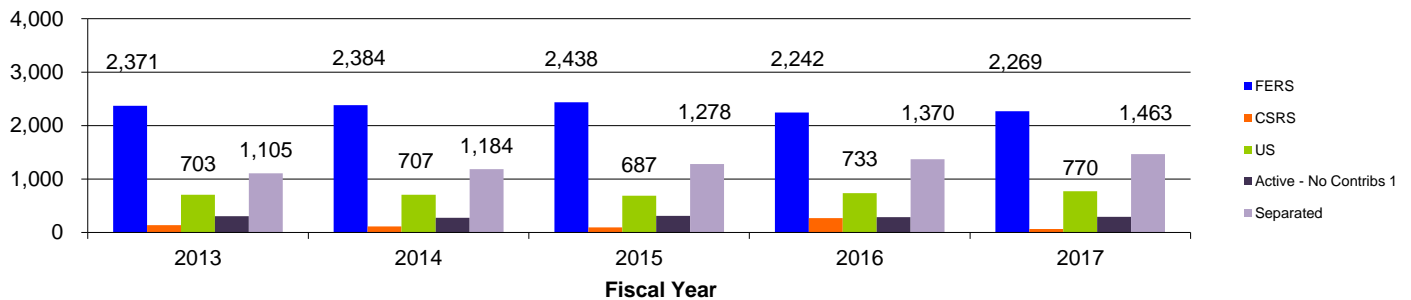
|     |           |          |
|-----|-----------|----------|
| Apr | \$545,533 | \$10,531 |
| Mar | \$542,745 | \$10,227 |
| Feb | \$546,843 | \$10,066 |

(in millions)

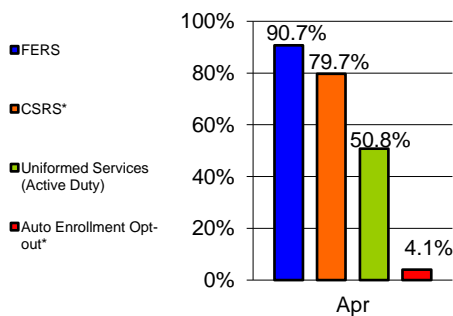
## Participants and Average Balance (current month)

|                    | Total Number of Participants | Average Balance | Number of Roth Participants | Average Roth Balance |
|--------------------|------------------------------|-----------------|-----------------------------|----------------------|
| FERS               | 3,304,026                    | \$138,607       | 484,116                     | \$11,945             |
| CSRS               | 328,071                      | \$143,125       | 9,962                       | \$18,355             |
| Uniformed Services | 1,417,611                    | \$23,726        | 545,942                     | \$7,059              |
| BRS Participants   | 183,067                      | \$6,820         | 126,467                     | \$5,623              |
| Bene Participants  | 22,712                       | \$106,841       | N/A                         | N/A                  |
| Total              | 5,255,487                    | N/A             | 1,166,487                   | N/A                  |

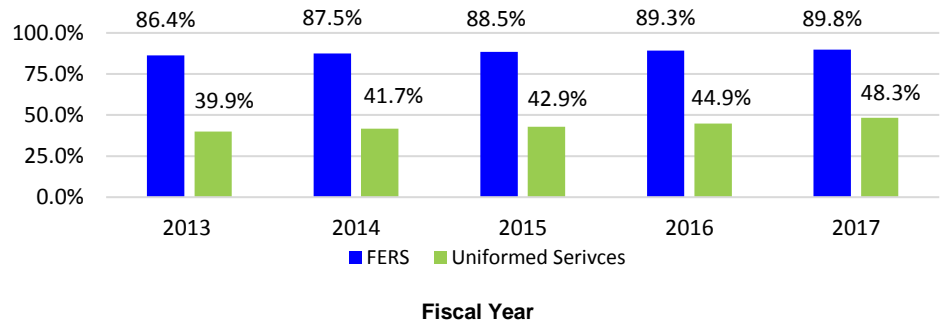
## Historic Participant Counts (in thousands)



## Participation Rates (current month)

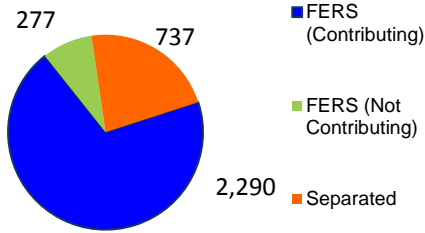


## Historic Participation Rates

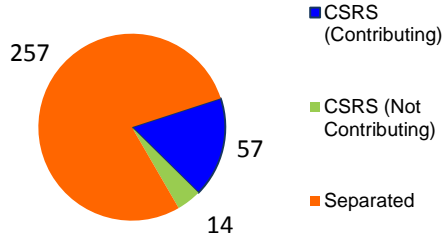


## Participant Composition (current month in thousands)

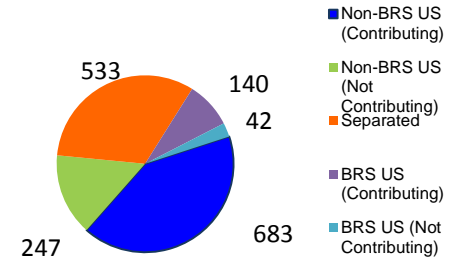
**FERS Participants**



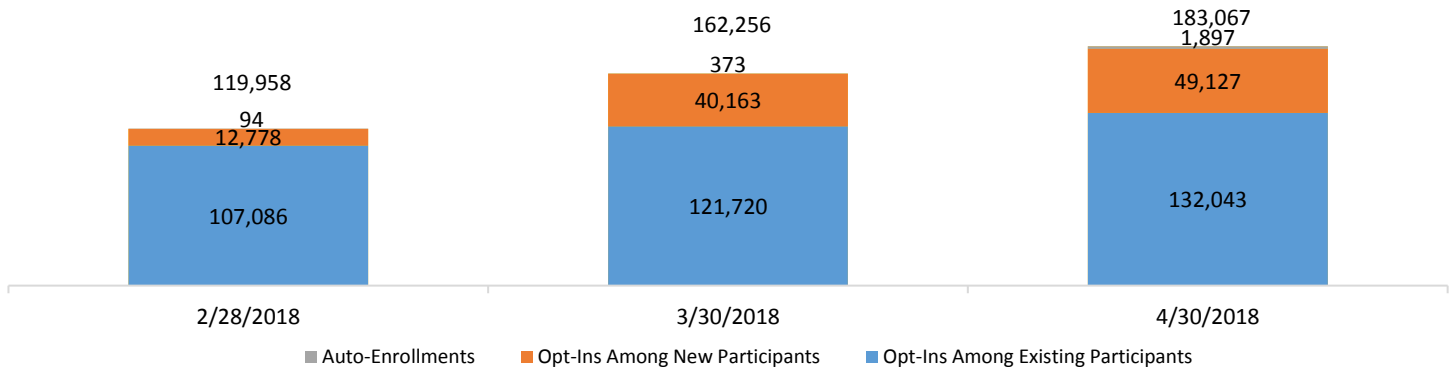
**CSRS Participants**



**Uniformed Services Participants**

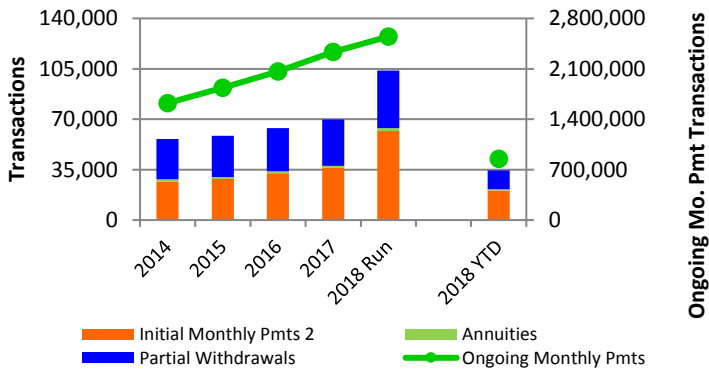


## BRS Participant Count

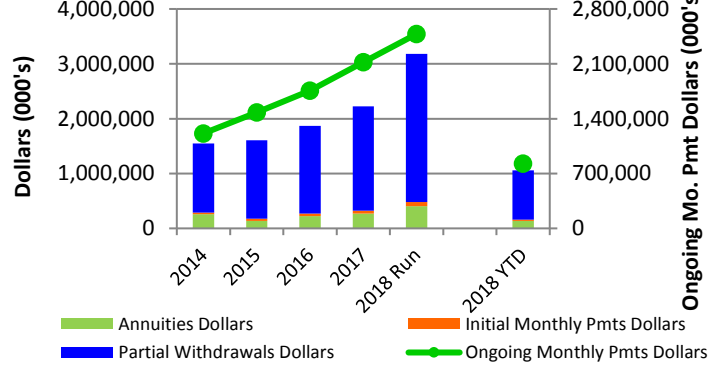


## Post-Separation Withdrawal Activity

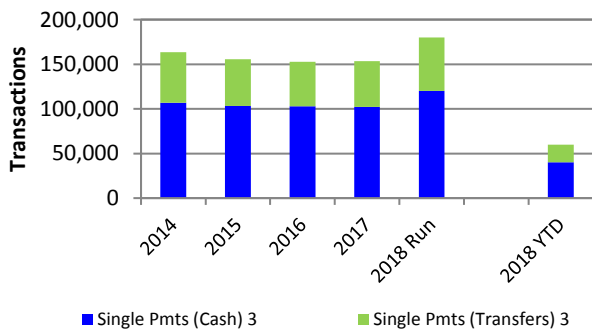
**Post-Separation Withdrawals (Excluding Single Payments)**



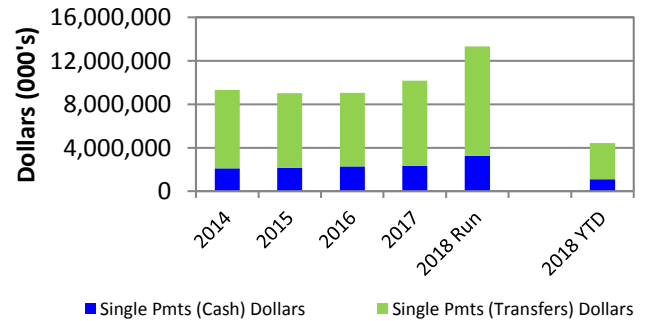
**Post-Separation Withdrawals (Excluding Single Payments)**



**Post-Separation Withdrawals Single Payments (Cash & Transfers)**

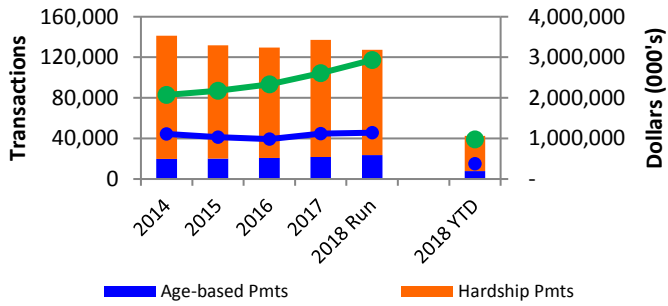


**Post-Separation Withdrawals Single Payments (Cash & Transfers)**

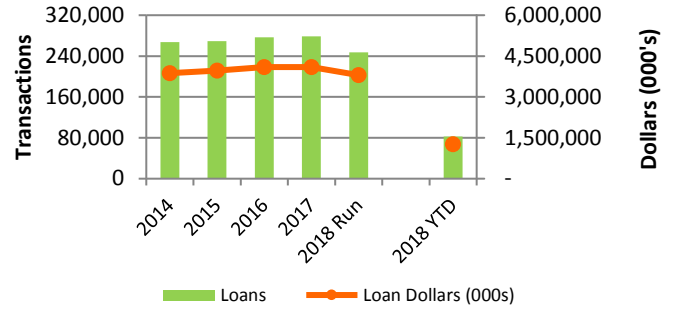


## In-Service Withdrawal and Loan Activity

### Age-Based & Hardship

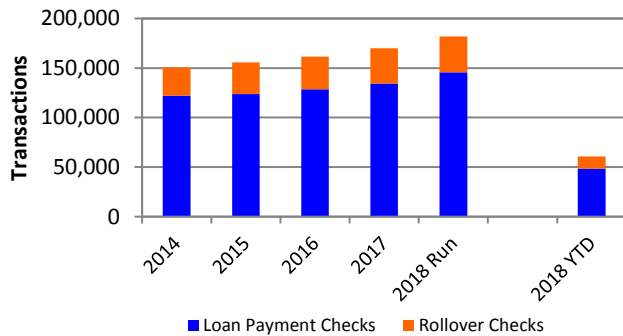


### Loans

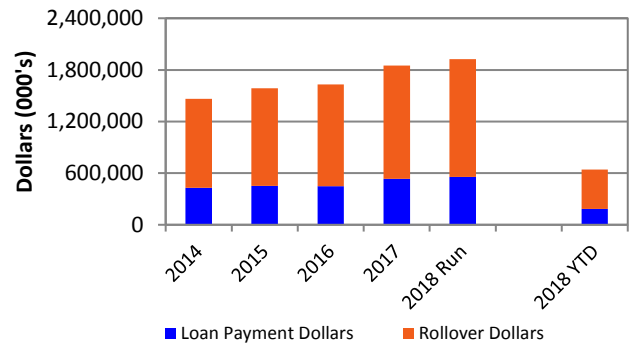


## Other Activity

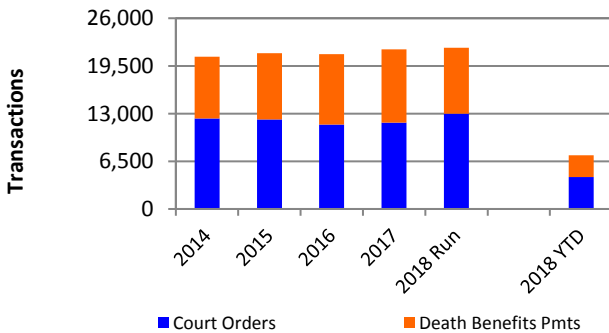
### Participant-Submitted Checks



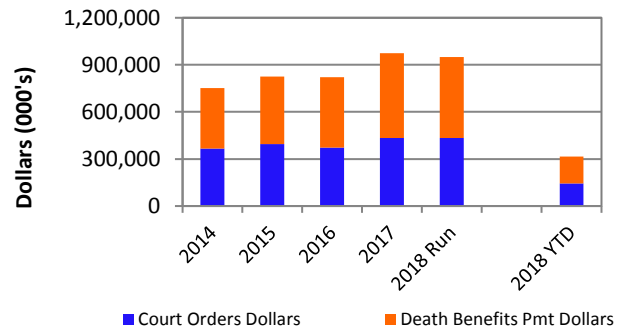
### Participant-Submitted Checks



### Legal Processing

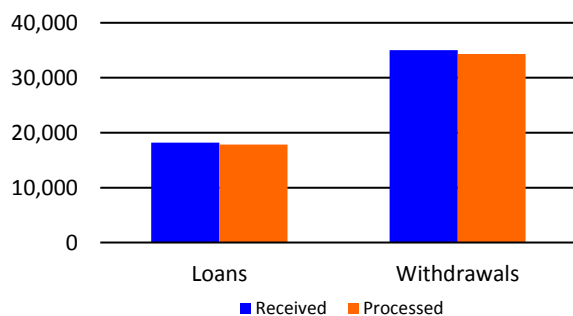


### Legal Processing

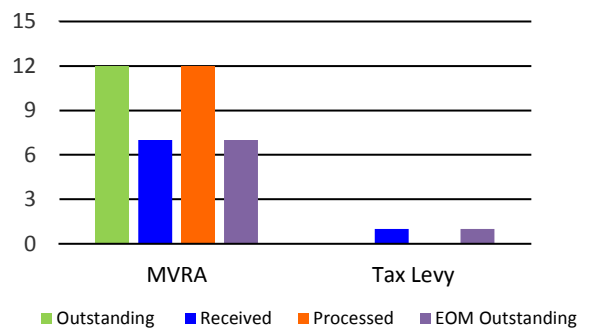


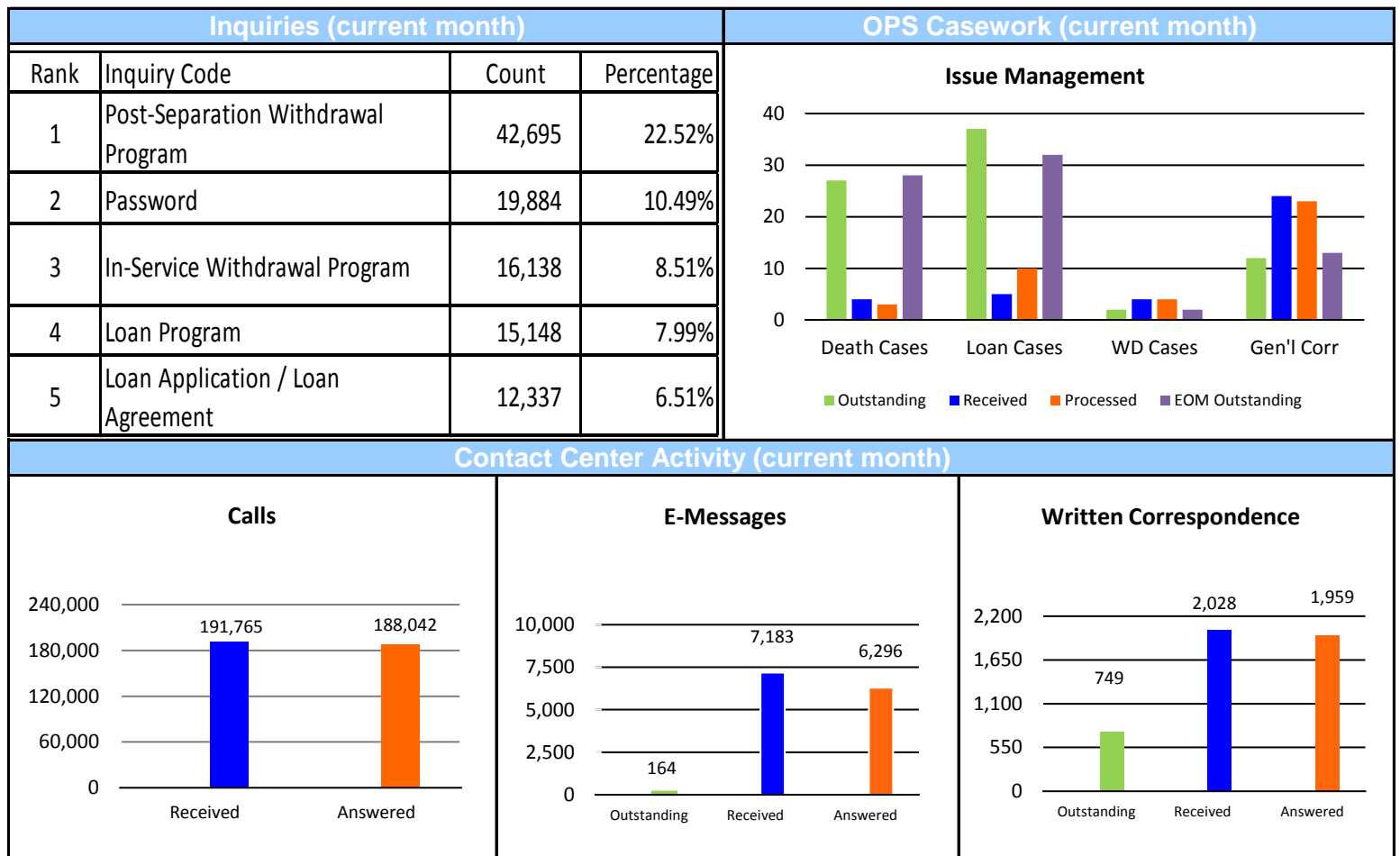
## Forms Processing (current month)

### Service Bureau Activity <sup>4</sup>



### MVRA & Tax Levy <sup>5</sup>





- Active participants with no current contributions include non-separated CSRS and uniformed services participants who have terminated contributions or had them suspended because of hardship withdrawal, participants whose employing agencies have not submitted their separation status, and beneficiary participants.
  - In addition to the initial monthly payments, 218,504 ongoing monthly payments were disbursed in April 2018.
  - Participants may elect to transfer all or part of their single payments. If only a portion is transferred, each portion (cash and transfer) is counted separately.
  - Forms Processed includes accepted and rejected forms.
  - Mandatory Victims Restitution Act and Tax Levy Processed means that the decision letter has been sent, but payment has not been made.
- \* There was an error in reporting CSRS Participation rate and Auto Enrollment Opt Out rate the past two months, they were higher than what was being reported.