

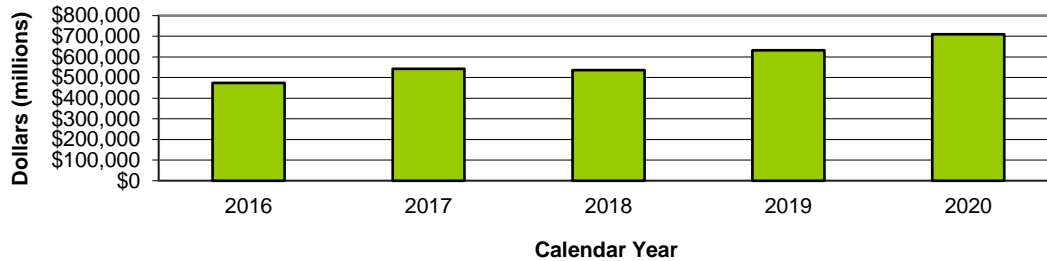
# Thrift Savings Fund Statistics

July, 2021

## Highlights

Although, participation rates remained flat in July we are on track to surpass the historical high annual participation rates of 93.5% (FERS) and 71.8% (uniformed Services) set in 2020. Hardship withdrawals and loans trended down by around 6%, and the total projected volume for 2021 is about 3% lower than 2020.

## Thrift Savings Fund Statistics



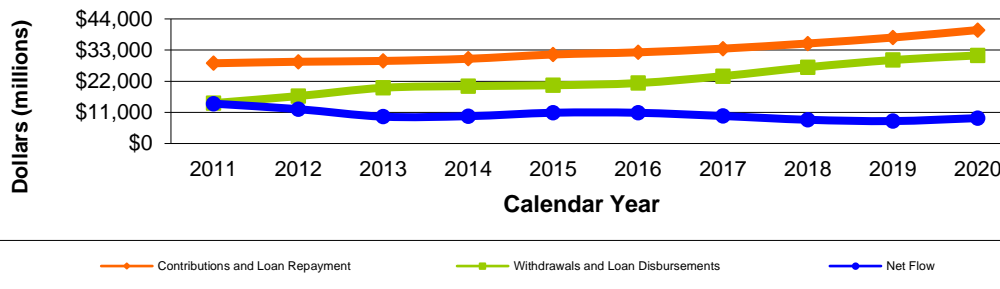
## Plan Balance

## Roth

Jul	\$780,276	\$32,081
Jun	\$773,293	\$31,357
May	\$762,265	\$30,438

(in millions)

## Cash Flow Attributes

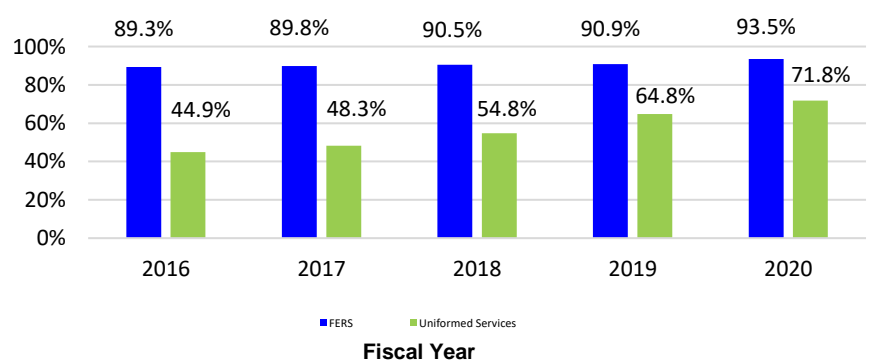
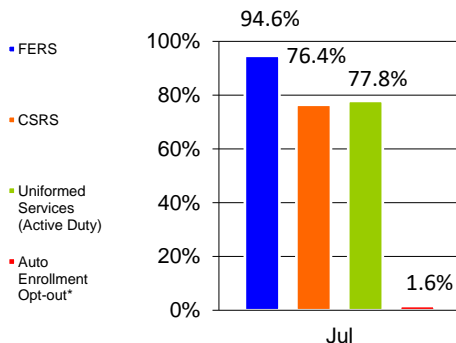


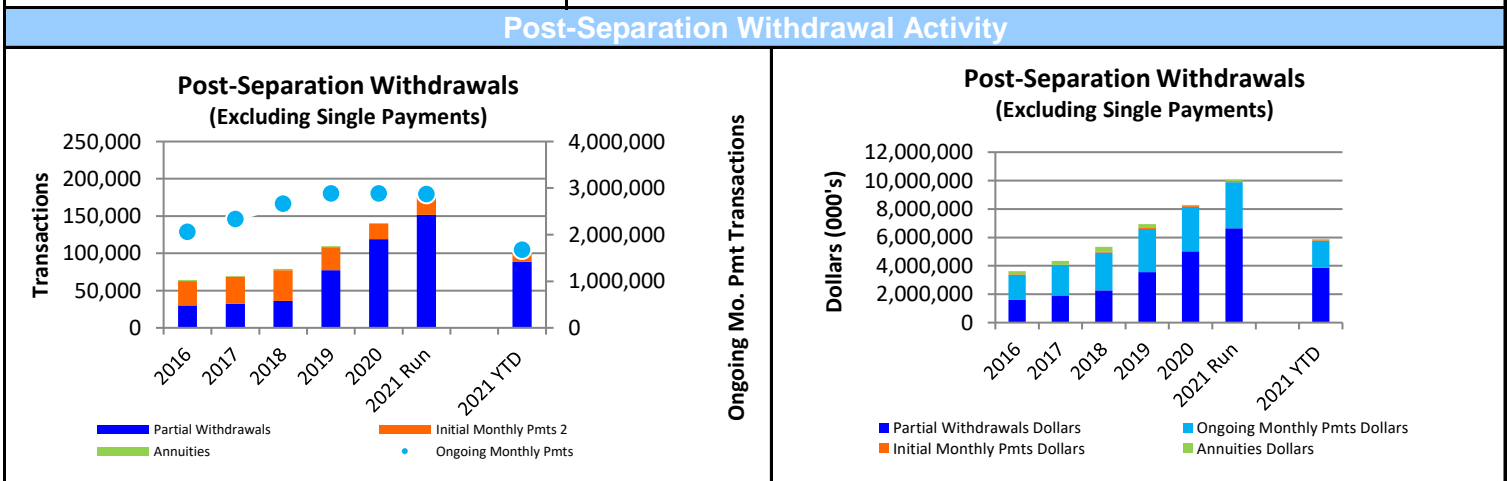
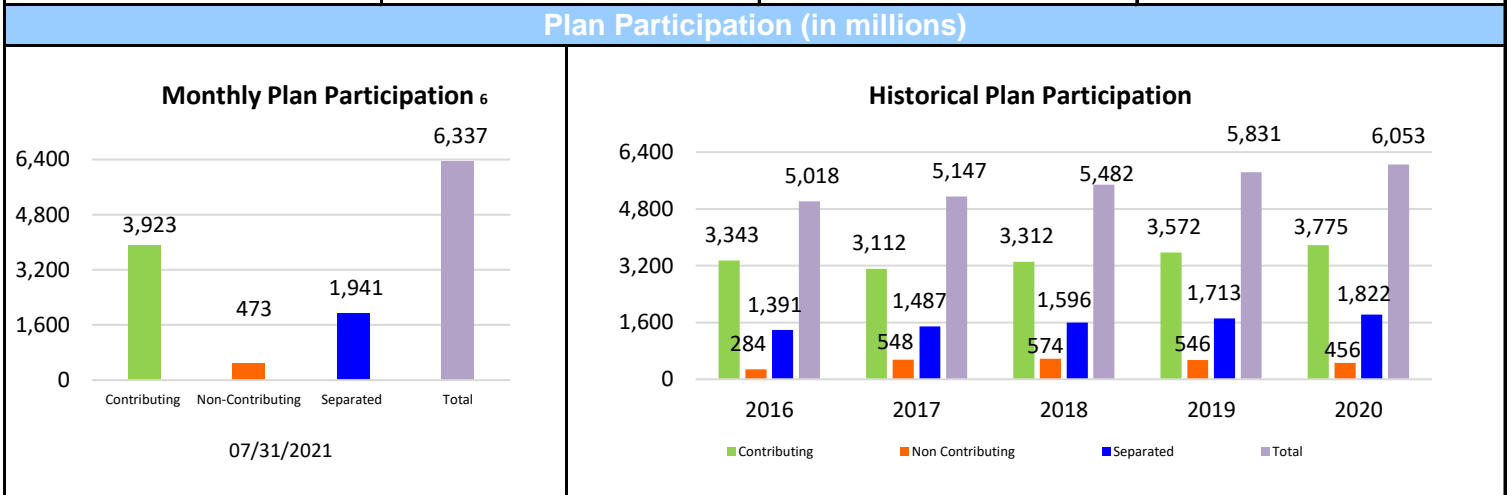
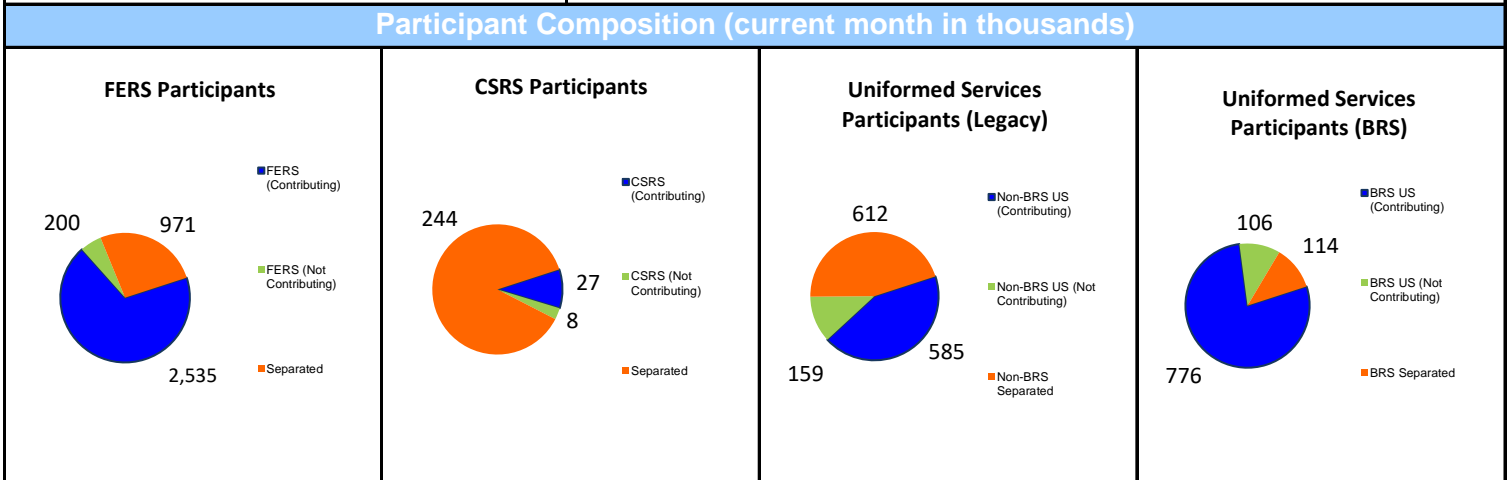
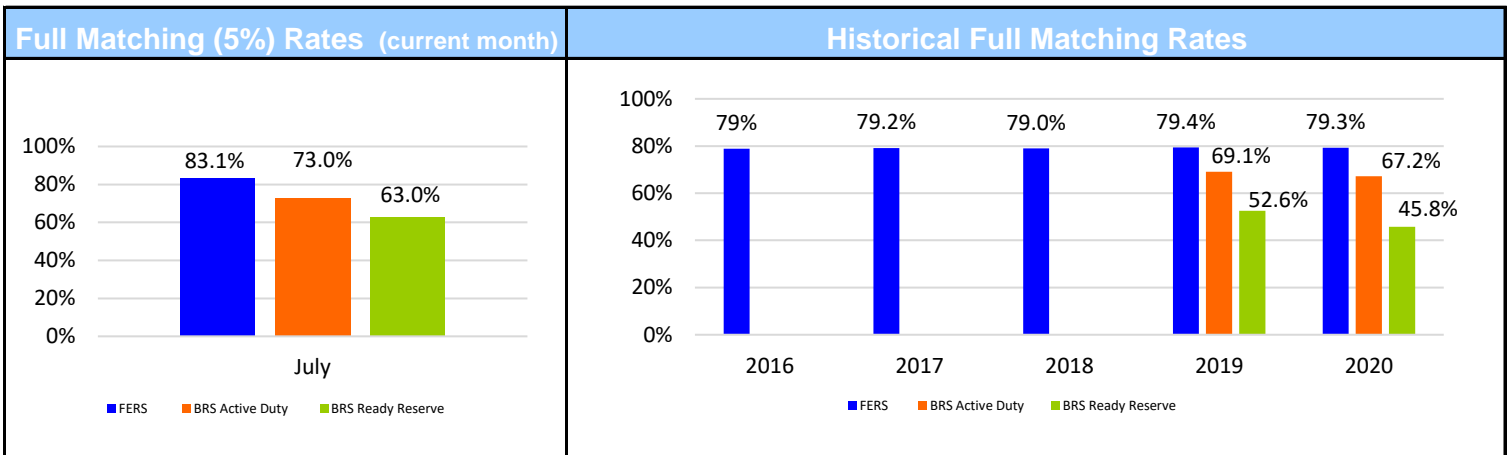
## Participants and Average Balance (current month)

	Total Number of Participants	Average Balance	Number of Roth Participants	Average Roth Balance
FERS	3,705,860	\$177,221	760,407	\$21,656
CSRS	279,427	\$189,597	10,136	\$30,359
Uniformed Services	1,357,938	\$38,353	610,508	\$16,554
BRS Participants	994,051	\$10,129	562,711	\$9,240
Bene Participants	33,944	\$137,672	1,898	\$13,650
Total	6,371,220	\$122,469	1,945,660	\$16,488

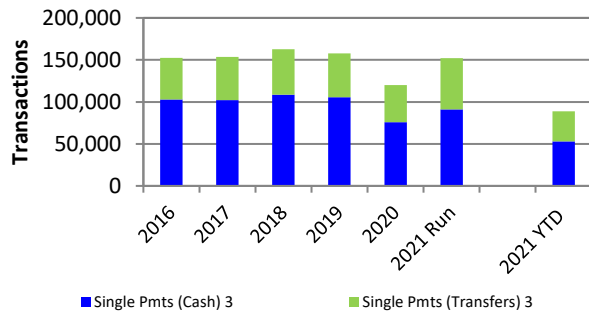
## Participation Rates (current month)

## Historical Participation Rates

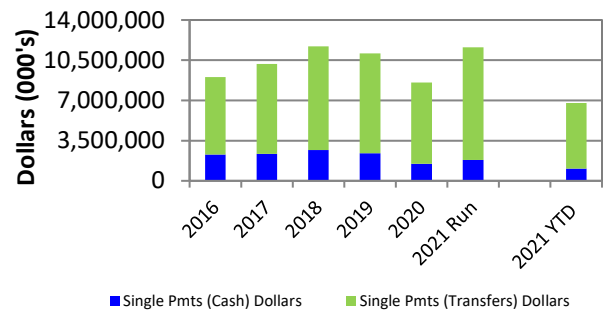




### Post-Separation Withdrawals Single Payments (Cash & Transfers)

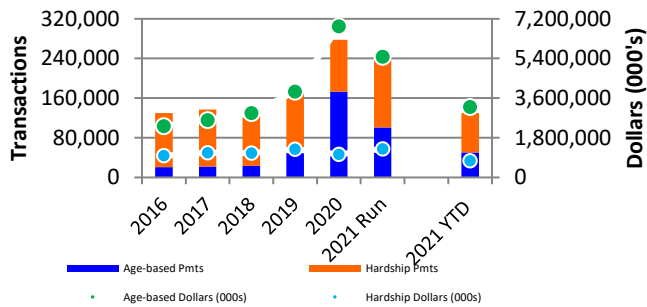


### Post-Separation Withdrawals Single Payments (Cash & Transfers)

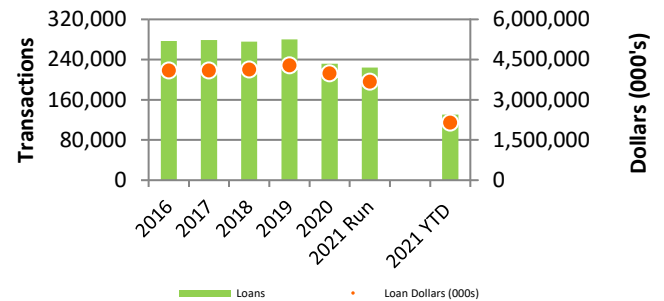


## In-Service Withdrawal and Loan Activity

### Age-Based & Hardship

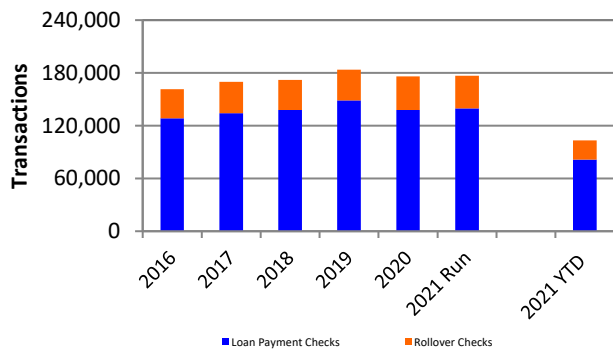


### Loans

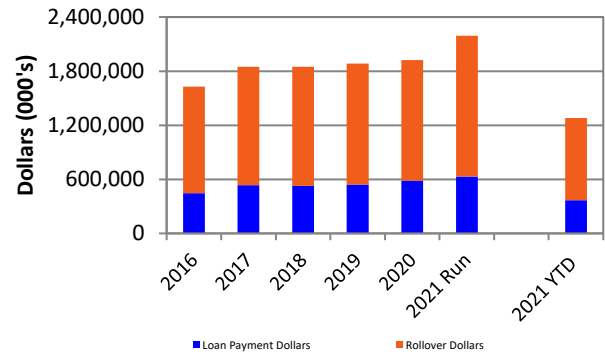


## Other Activity

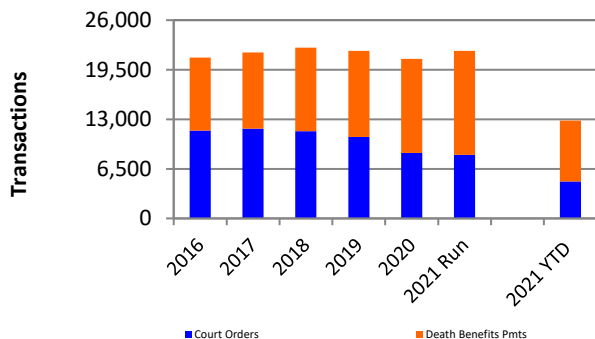
### Participant-Submitted Checks



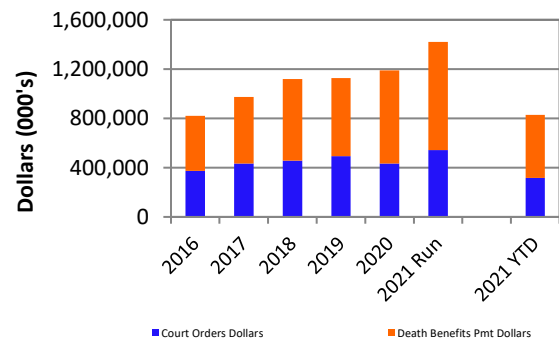
### Participant-Submitted Checks



### Legal Processing

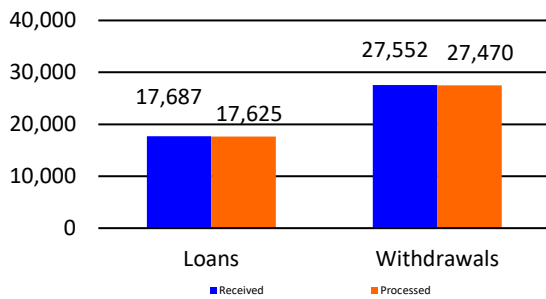


### Legal Processing

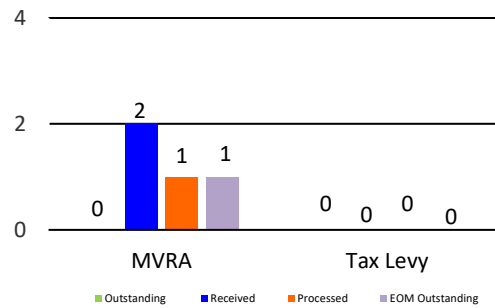


## Forms Processing (current month)

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



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



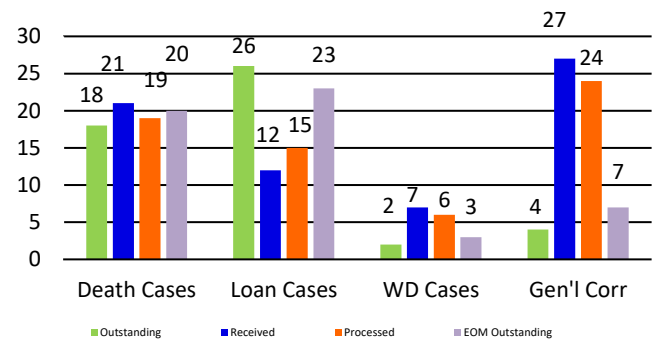
## Inquiries (current month)

### Top 5 Inquiry Reasons

Rank	Inquiry Code	Count	Percentage
1	Post-Separation Withdrawal Program	28,104	15.99%
2	Transaction Verification	20,202	11.49%
3	In-Service Withdrawal Program	14,357	8.17%
4	Loan Program	13,661	7.77%
5	EDR, Contributions, Neg. Adjustments, Acct Balances	9,379	5.34%

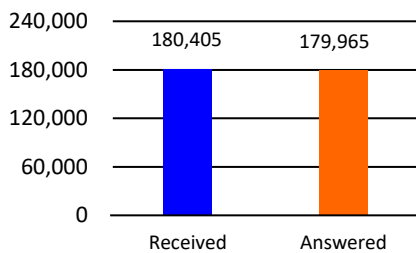
## OPS Casework (current month)

### Issue Management

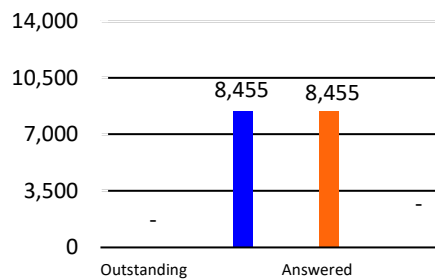


## Contact Center Activity (current month)

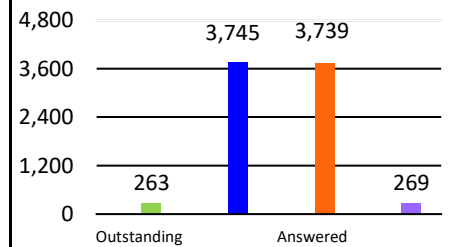
### Calls



### E-Messages \*



### Written Correspondence \*



- 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, 240,640 ongoing monthly payments were disbursed in July, 2021.
  - 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.
- \* Previous Month Outstanding + Received = Processed + Current Month Outstanding. Slight discrepancy due to times when reports are run and real time tasks are entered.
6. This number does not include the FERS Agency Contributions only.