

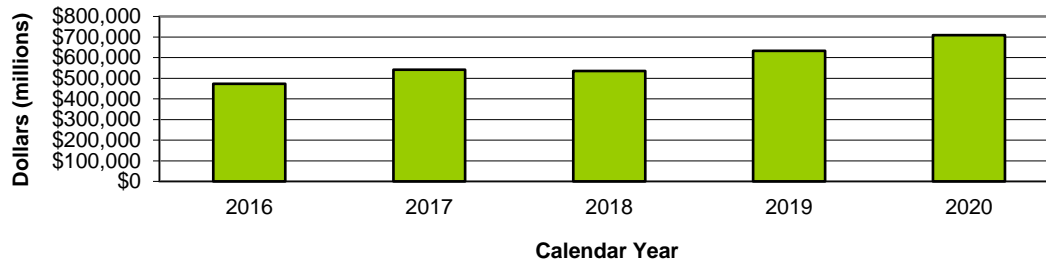
# Thrift Savings Fund Statistics

February 2021

## Highlights

We continue to see a climb in the participation rate for active duty Uniformed Service; it is now 77.1%. The change to 5% auto-enrollment is starting to show positive impact among our BRS population, 68.5% is receiving the full matching contribution as compared to 66.2% at this time last year. Additionally, we had a high volume of roll-ins in February; with 3,362 transactions totaling \$140 million flowing into the plan.

## Thrift Savings Fund Statistics



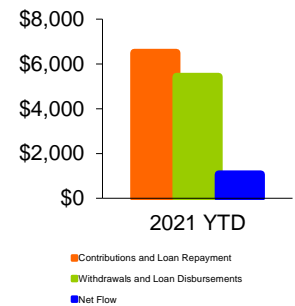
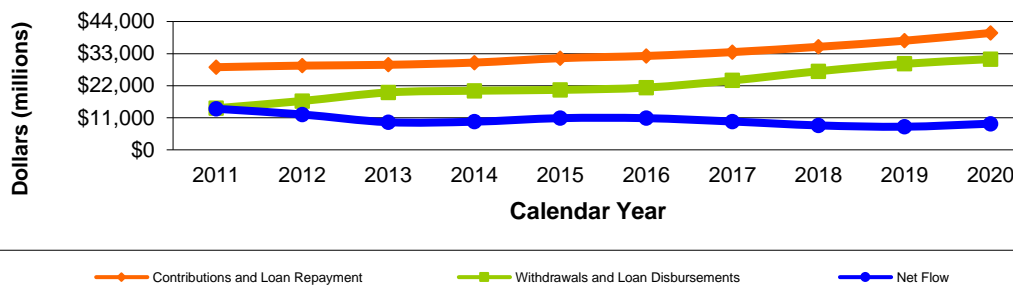
## Plan Balance

## Roth

Feb	\$723,467	\$27,402
Jan	\$709,040	\$26,393
Dec	\$709,638	\$26,046

(in millions)

## Cash Flow Attributes

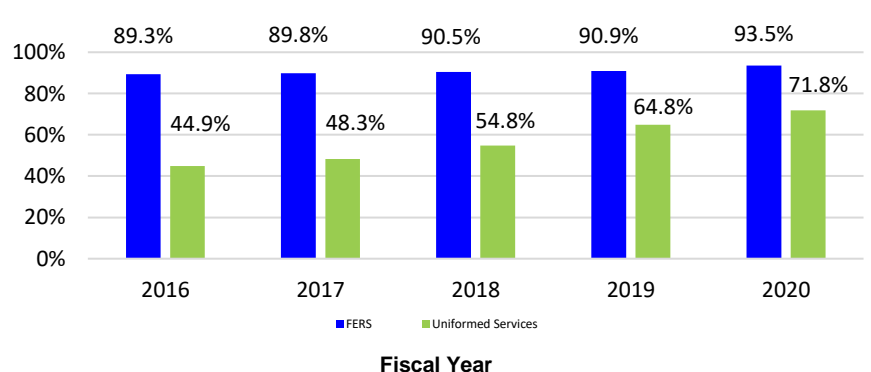
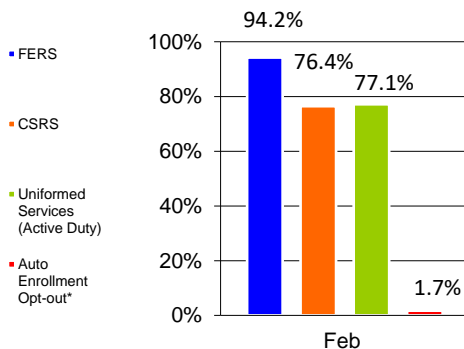


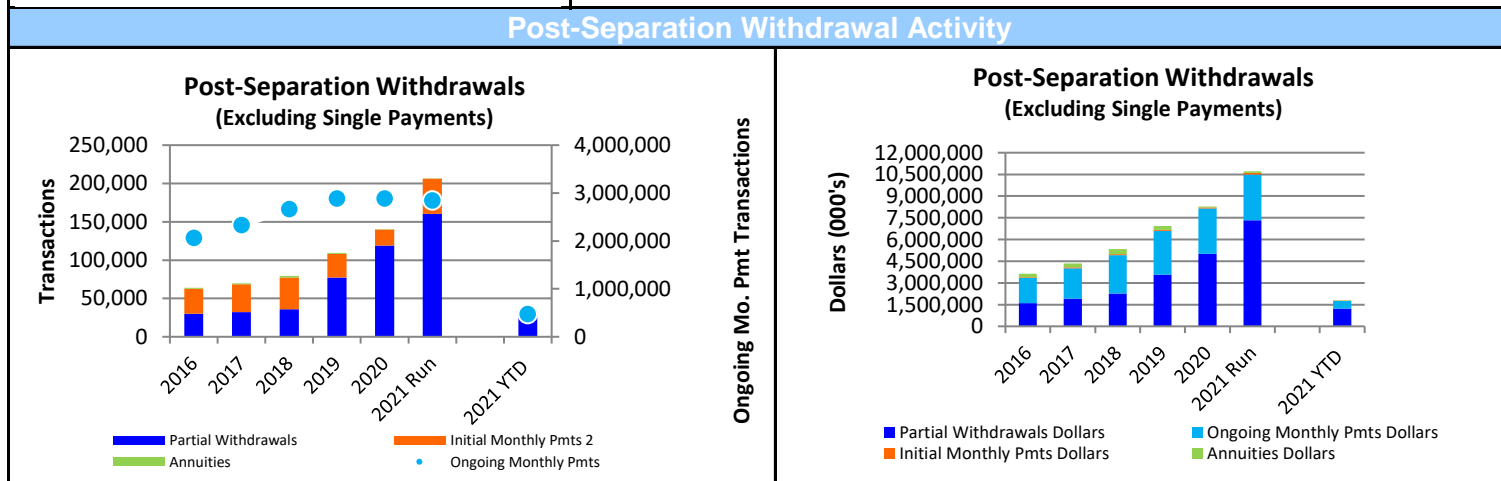
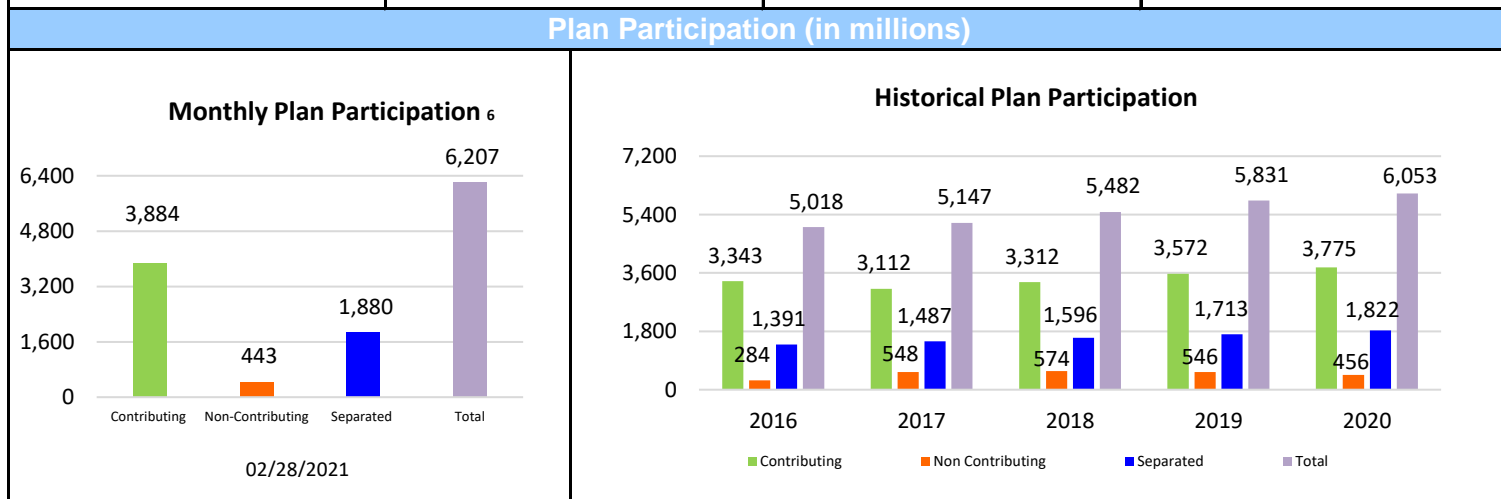
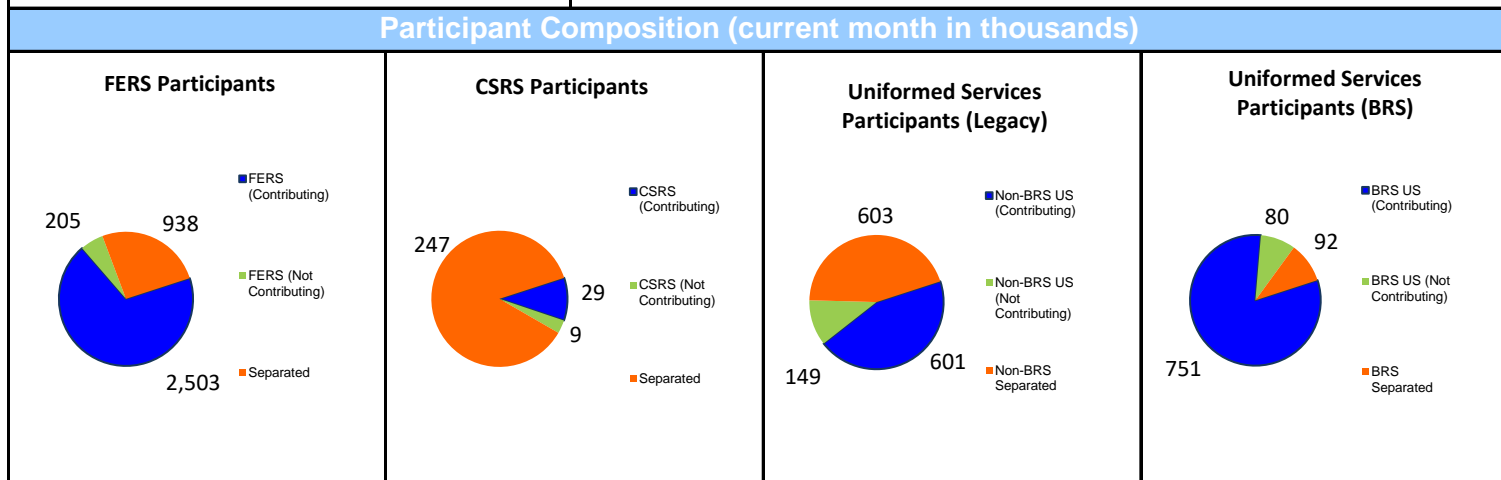
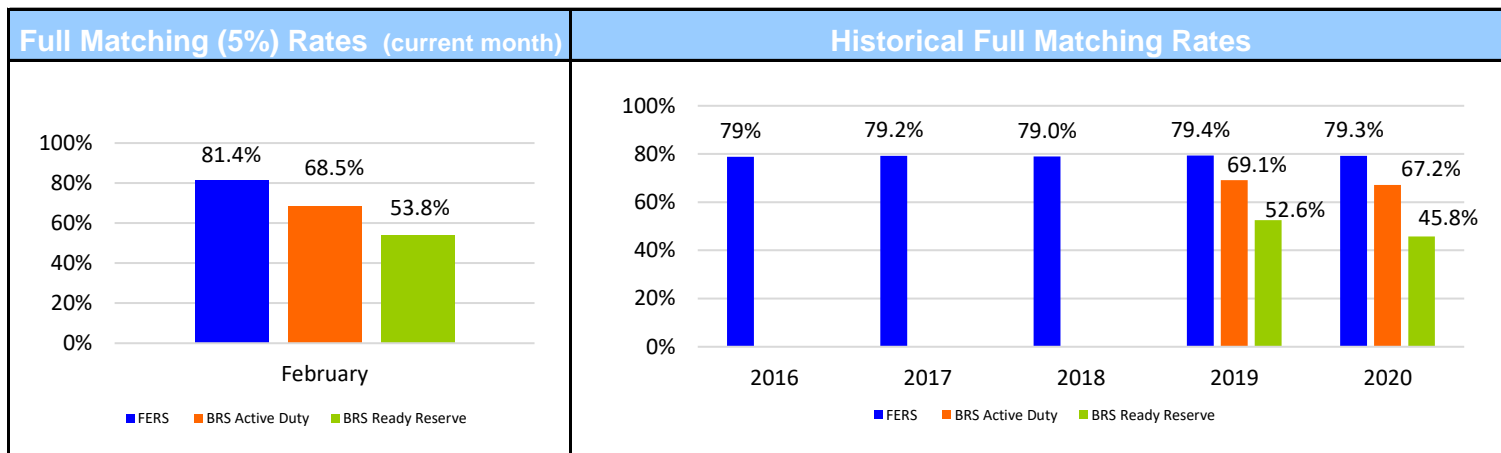
## Participants and Average Balance (current month)

	Total Number of Participants	Average Balance	Number of Roth Participants	Average Roth Balance
FERS	3,645,828	\$166,868	722,127	\$19,593
CSRS	284,950	\$177,208	10,186	\$27,799
Uniformed Services	1,364,147	\$35,176	594,209	\$14,668
BRS Participants	911,656	\$8,903	512,580	\$8,301
Bene Participants	32,102	\$130,592	1,696	\$12,051
Total	6,238,683	\$115,965	1,840,798	\$14,885

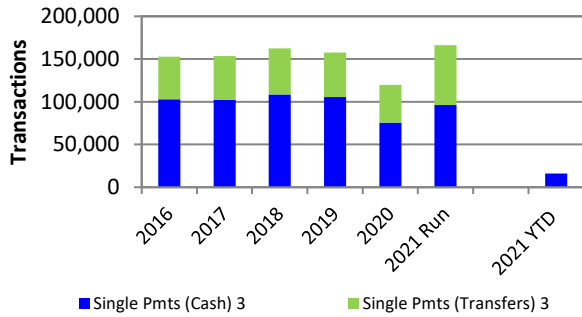
## Participation Rates (current month)

## Historical Participation Rates

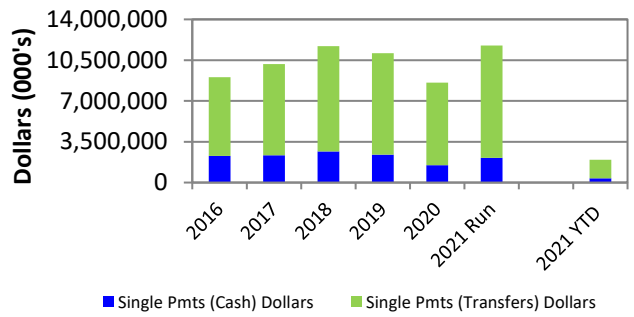




### Post-Separation Withdrawals Single Payments (Cash & Transfers)

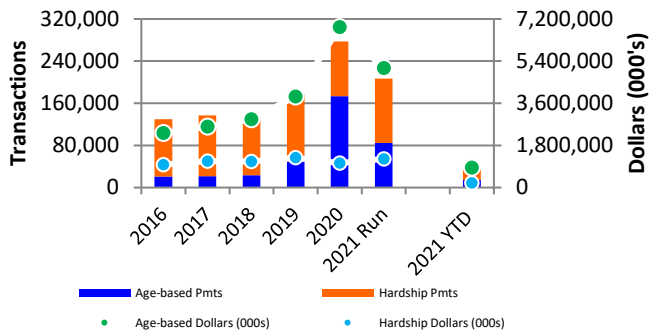


### Post-Separation Withdrawals Single Payments (Cash & Transfers)

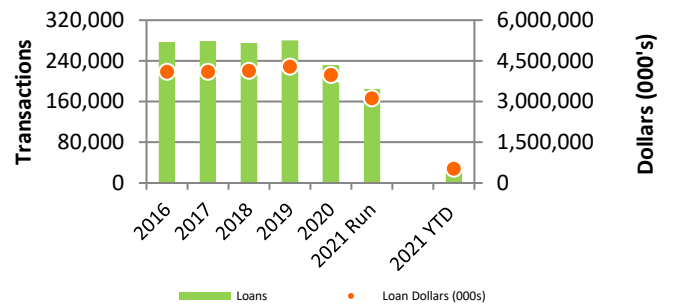


## In-Service Withdrawal and Loan Activity

### Age-Based & Hardship

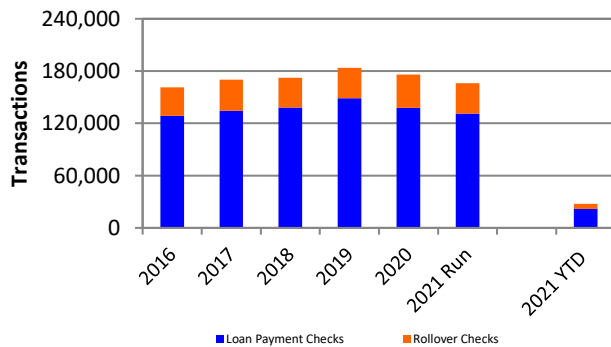


### Loans

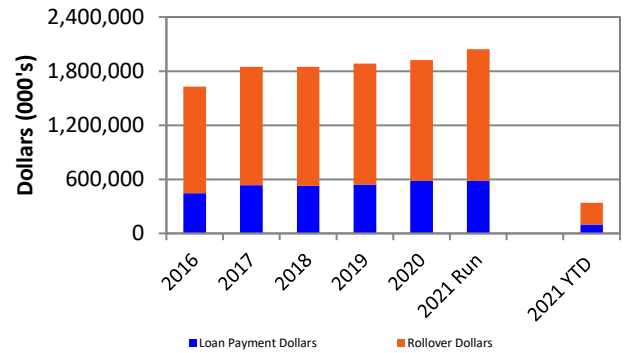


## Other Activity

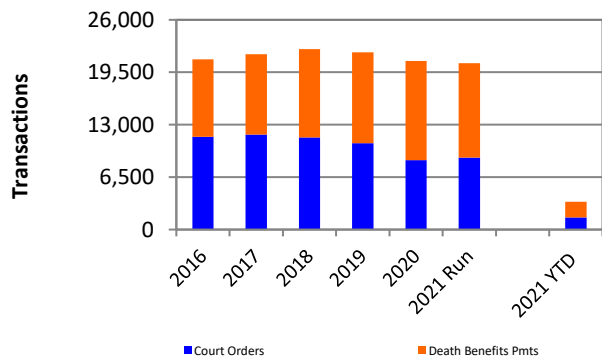
### Participant-Submitted Checks



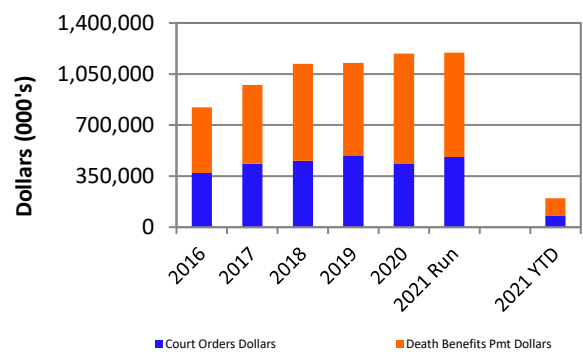
### Participant-Submitted Checks



### Legal Processing

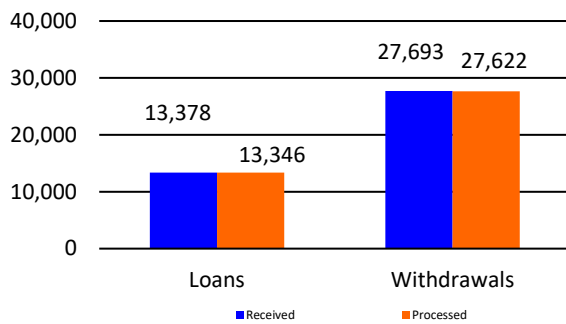


### Legal Processing

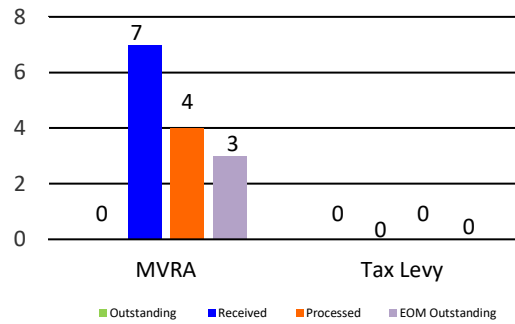


## Forms Processing (current month)

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



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



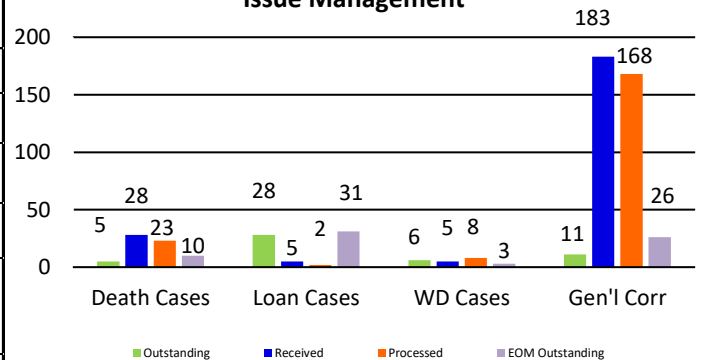
## Inquiries (current month)

### Top 5 Inquiry Reasons

Rank	Inquiry Code	Count	Percentage
1	Post-Separation Withdrawal Program	32,831	15.99%
2	Transaction Verification	18,752	9.14%
3	Participant Profile	12,612	6.14%
4	EDR, Contributions, Neg Adjustments, Acct Balance	11,958	5.83%
5	Password reset vocally	11,425	5.57%

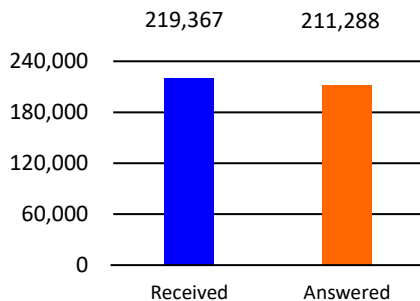
## OPS Casework (current month)

### Issue Management

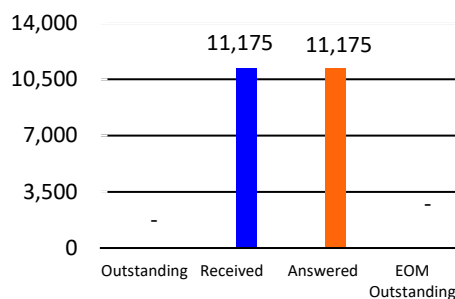


## Contact Center Activity (current month)

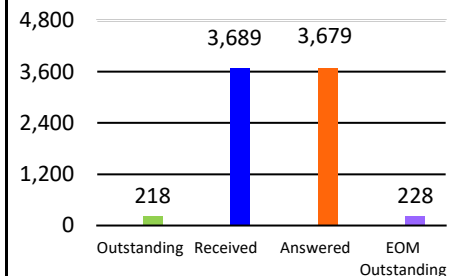
### Calls



### 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, 238,520 ongoing monthly payments were disbursed in February, 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.