

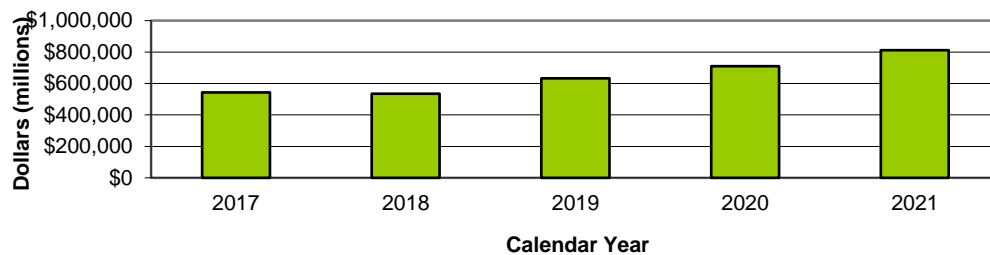
# Thrift Savings Fund Statistics

March, 2022

## Highlights

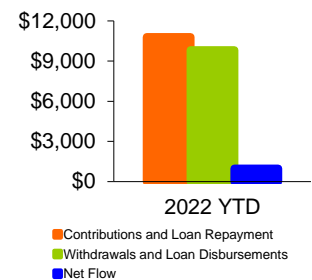
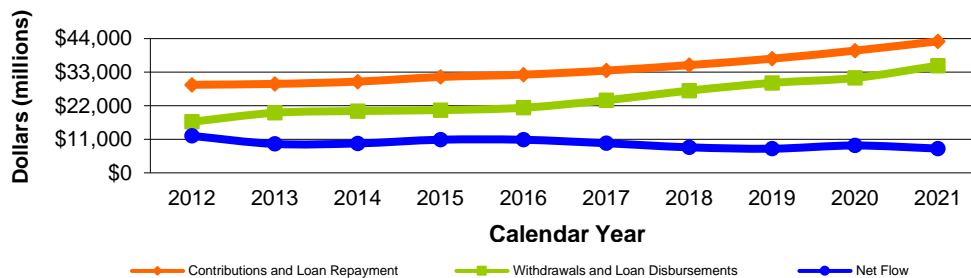
In March, we had over 3,200 roll-in transactions totaling \$151 million. This was the highest dollar volume of roll-ins in the past 2 years and exceeded March 2021 by over \$11 million. Post separation, hardship withdrawals and loans have been a bit higher than prior years for this period, we will continue to monitor this activity. This is possibly due to anticipation of the planned downtime required for the Converge transition. The contact center appears to have overcome its staffing deficit and exceeded phone and e-messaging SLRs. Also, written correspondence is back on track as we head into April.

## Thrift Savings Fund Statistics



Plan Balance		Roth
Mar	\$782,292	\$35,430
Feb	\$769,493	\$34,209
Jan	\$780,559	\$34,302
(in millions)		

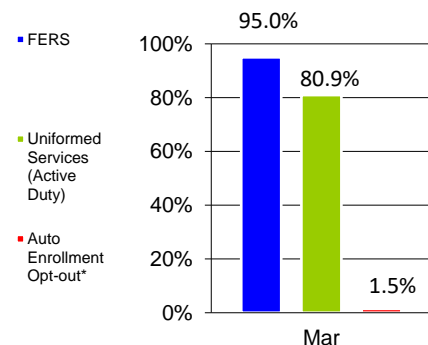
## Cash Flow Attributes



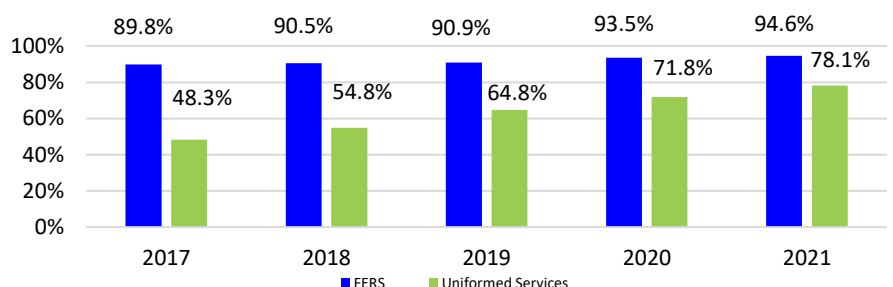
## Participants and Average Balance (current month)

	Total Number of Participants	Average Balance	Number of Roth Participants	Average Roth Balance
FERS	3,778,156	173,926	819,715	\$22,106
Uniformed Services	1,354,326	38,571	627,062	\$17,539
BRS Participants	1,115,120	10,540	647,002	\$9,280
CSRS	270,847	189,079	9,954	\$30,818
Bene Participants	36,926	137,675	2,277	\$14,758
Total	6,555,375	119,651	2,106,010	\$16,823

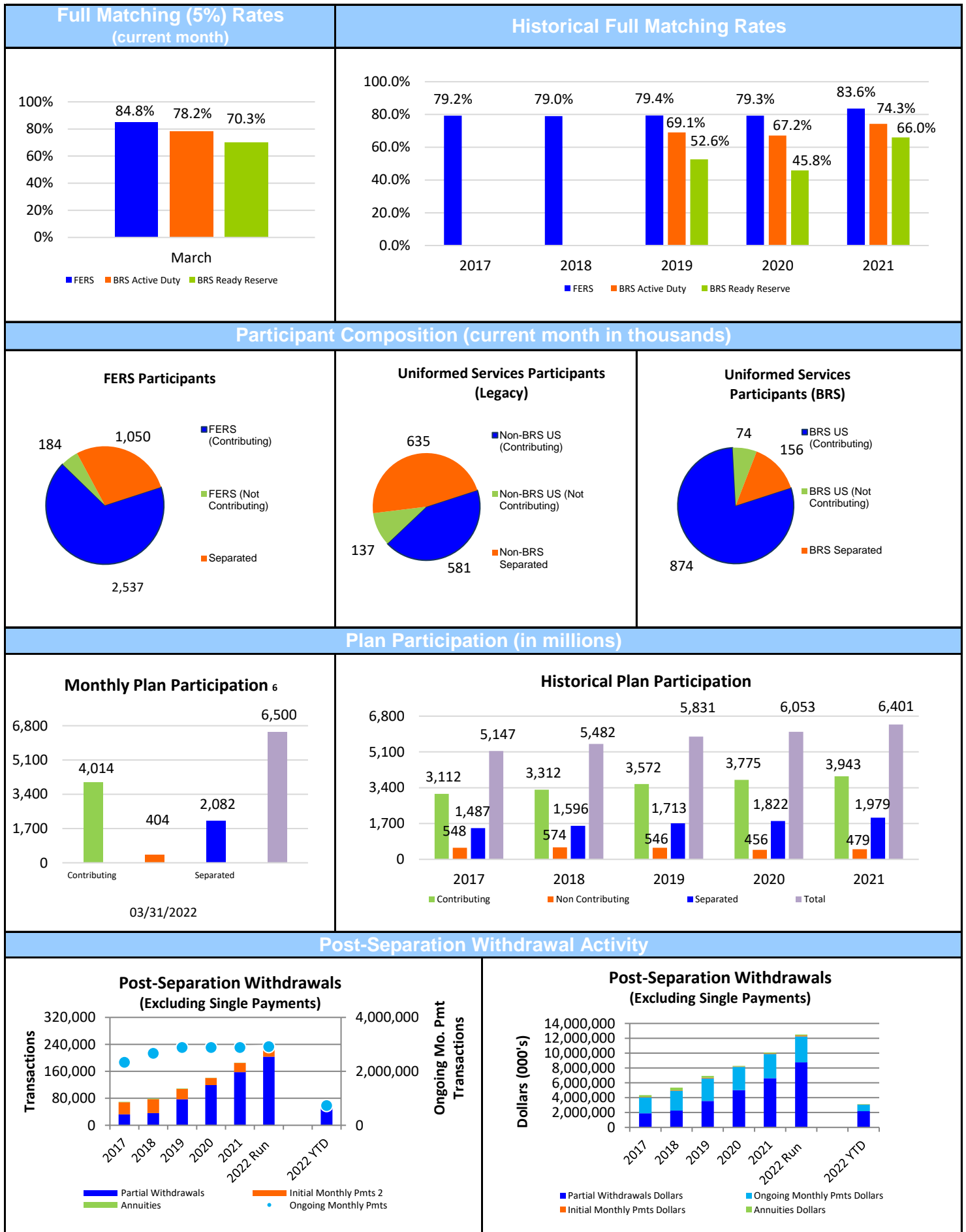
## Participation Rates (current month)



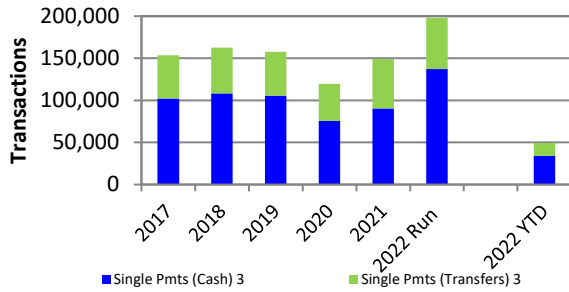
## Historical Participation Rates



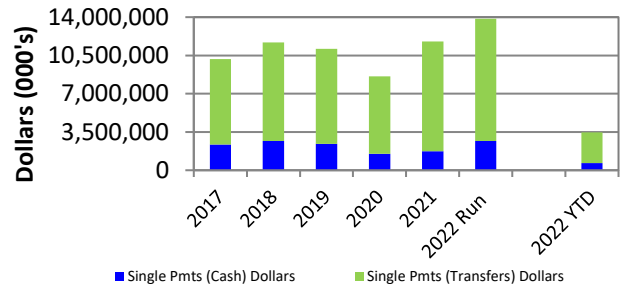
Fiscal Year



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

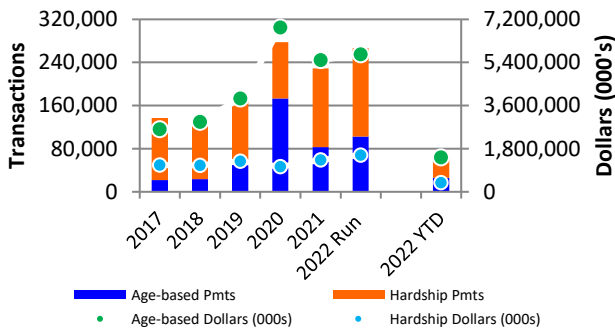


### Post-Separation Withdrawals Single Payments (Cash & Transfers)

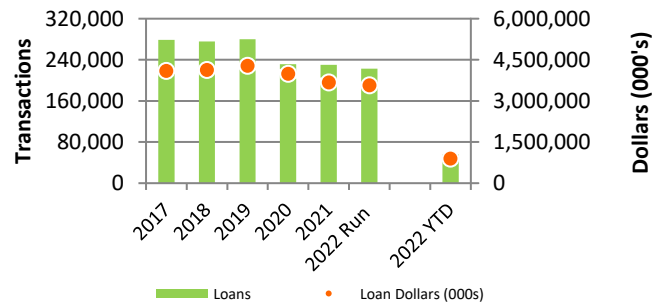


## In-Service Withdrawal and Loan Activity

### Age-Based & Hardship

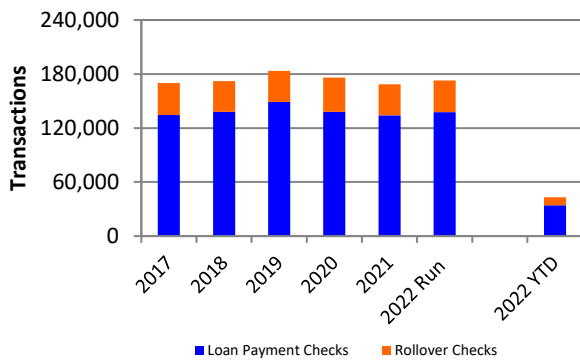


### Loans

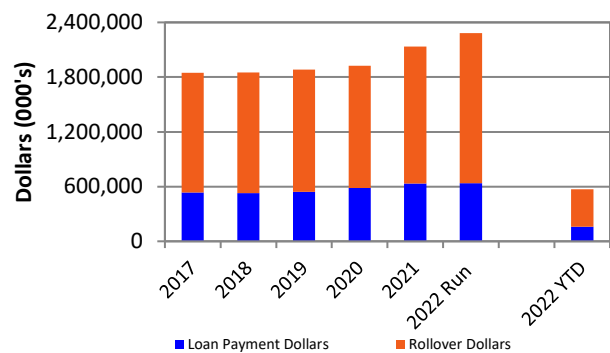


## Other Activity

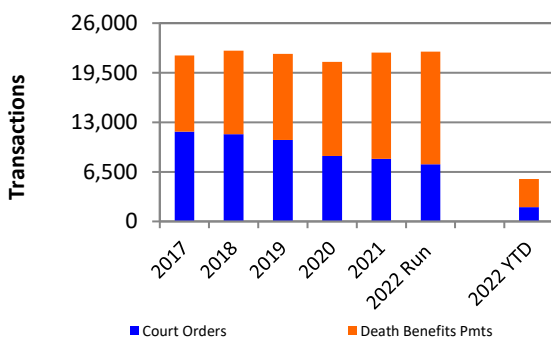
### Participant-Submitted Checks



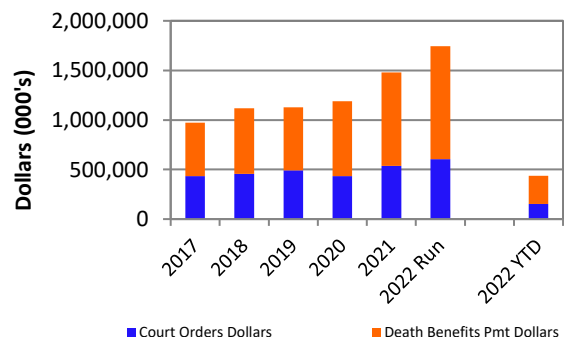
### Participant-Submitted Checks



### Legal Processing

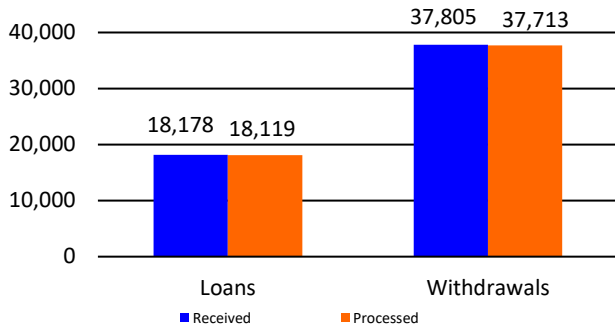


### Legal Processing

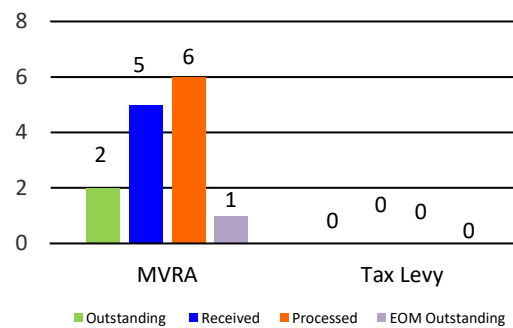


## Forms Processing (current month)

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



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



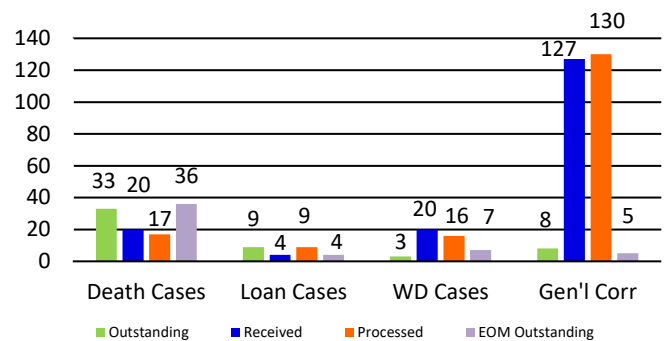
## Inquiries (current month)

### Top 5 Inquiry Reasons

Rank	Inquiry Code	Count	Percentage
1	Post-Separation Withdrawal Program	35,868	18.01%
2	Transaction Verification	22,111	11.10%
3	In-Service Withdrawal Program	15,810	7.94%
4	Loan Program	14,317	7.19%
5	Password reset vocally	10,113	5.08%

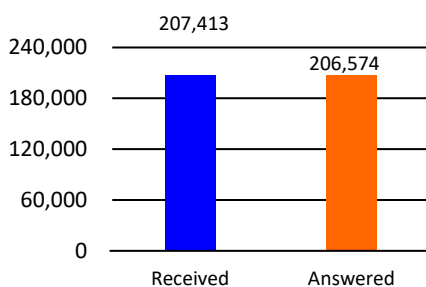
## OPS Casework (current month)

### Issue Management

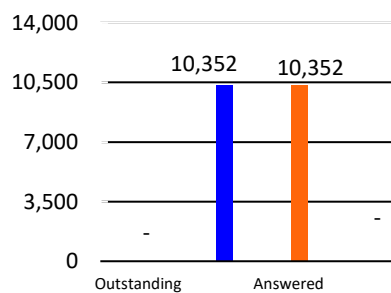


## Contact Center Activity (current month)

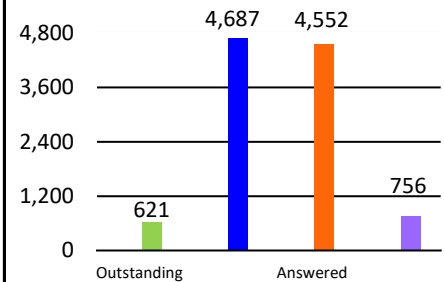
### Calls



### E-Messages \*



### Written Correspondence \*



1. 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.

2. In addition to the initial monthly payments, 243,878 ongoing monthly payments were disbursed in March, 2022.

3. 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.

4. Forms Processed includes accepted and rejected forms.

5. 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.