Planning, Inc.
Leadership • Education • Training
Service Disabled Veteran Owned
www.planprograms.com

GSA

PLANNING, Inc. Retirement Training

Introduction
PLANNING, Inc. is a small, minority and service-disabled veteran-owned training company offering specialized human resource solutions to the federal workforce. Since our founding in 1982, PLANNING, Inc. has developed a reputation for excellence as a provider of retirement and financial planning seminars. Topics in our retirement and financial planning seminars include federal retirement benefits; financial planning and the TSP; tax and estate planning; career transition planning; lifestyle transition and health and wellness in retirement. In 2009 we expanded our portfolio to include training in leadership development and succession planning, program management skills training, and Human Capital consultation.

We have organized and delivered over 4,000 programs to 70 different federal agencies since 1982, reaching more than 150,000 participants. We conduct live, instructor-led classroom style seminars and virtual seminars. Additionally, we provide one-on-one retirement benefits counseling for the federal workforce.

Seminars
Our seminars are flexible and are tailored to meet the needs of our client agencies. They are delivered by subject matter experts using mixed audio/visual support and organized around the following specifically designed modules (seminar length and topics selected by agencies):

- Federal Retirement Benefits
- Financial Planning and the TSP
- Tax and Estate Planning
- Health and Wellness
- Transition Planning

Other seminar features:

- Comprehensive, customized, easy-to-understand resource materials
- A dedicated customer service team
- Interactive dialogue between instructors and students
- Spouses attend free of charge

Client Agencies
PLANNING, Inc. has been conducting Pre-Retirement Planning, Mid-Career Planning, and New Employee Orientation seminars for over 34 years. A number of our client agencies have been with us for many years. PLANNING is, and has been, the prime contractor for all work performed.

Some of the agencies with whom we are associated include:

- General Services Administration
- National Geospatial-Intelligence Agency
- Department of the Treasury
- Department of Commerce
- Department of Defense (Army, Navy)
- Department of the Interior
- Department of Health and Human Services
- Department of Homeland Security
- Architect of the Capitol
- Library of Congress

Address, Contact and Profile Information

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Business Size	**Business Type**
Small/<$7.0M	Corporate Entity (not tax-exempt) Service-Disabled, Veteran-Owned Small Business
EIN:	52-2254450
DUNS:	196085997
GSA MAS:	GS-02F-0002R
SAM	Active. Updated 06 June 2016. Valid through 05 June 2017
TRAC	4143-0671-8323
NAICS Code:	611430, 541611, 541612, 541690, 611710, 611699

Lines of Business: Retirement Benefits; Financial, Tax and Estate Planning Seminars for Federal Employees; Health and Wellness Programs; Work-Life Balance; Retirement Benefits Counseling; Leadership Development Training; Career Transition Planning; Program Management; Succession Planning; Human Capital Consultation

PLANNING, Inc. accepts Government credit cards, EFT, and checks.