

Planning, Inc.



Leadership • Education • Training

Service Disabled Veteran Owned
www.planprograms.com



PLANNING, Inc. HR Solutions

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 federal retirement benefits and financial planning seminars. 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. In addition to these programs, we provide one-on-one retirement benefits counseling for federal employees. Over the past few years, we have expanded our scope of instruction to include leadership development training, succession planning, career transition planning, program management skills training and Human Capital consultation.

Federal Benefits Counseling

Our Senior Benefits Specialists have more than 20 years' experience in the field of federal employee benefits. Our counselors provide one-on-one sessions on all retirement issues and have been involved in past "open season" drives with respect to FERS, TSP, FEHB, FEGLI, FLTCIP FSAFEDS, and FEDVIP. Some of the key services provided by our counselors are:

- Provide counseling to federal employees on retirement, disability, health and life insurance, the TSP, and related matters
- Review official personnel folders to ensure all relevant service is documented, employees are in correct retirement system and files are complete and correct
- Prepare retirement annuity estimates
- Prepare estimates of deposits and redeposit service and initiate billing by OPM
- Review and forward retirement papers to OPM through the National Finance Center

Client Agencies

Planning, Inc. has been conducting one-one-one counseling for the past 16 years. During that time, we have worked with agencies such as:

- Department of Justice Civil Division
- Department of Justice Tax Division
- Department of Defense (Army)
- Nuclear Regulatory Commission
- Smithsonian Institution

Succession Planning

PLANNING, Inc. offers Succession Planning consultations, where we provide a nationally-recognized faculty of Human Capital Management and Leadership Succession Planning subject matter experts to assist clients with the identification of agency needs, the establishment of leadership development protocols, and the mentoring, coaching and training of "next generation leaders."

Health & Wellness

We offer workshops structured around two fundamental themes - health and wellness and work-life balance. They are conducted by health educators and lifestyle/transition professionals and supported by audio/visual aids. Workshops are built around the following topics:

Health Workshops

- Components of Wellness
- How Fit Are You
- Designing a Muscular Strength and Endurance Program
- Designing a Cardiovascular Fitness Program
- Why People Don't Lose Weight
- Body Fat Assessment
- Creating the Recipe for a Balanced and Healthy Lifestyle

Work/Life Balance Workshops

- Perspectives on Life Transitions
- Creating a Balanced and Satisfying Retirement
- Positive Thinking - Make It a Choice
- Stress Without Distress
- Caring for the Caregiver

Seminar Features

- Objectives stated for each seminar topic
- Handouts and/or worksheets provided for each seminar
- Excellent interaction between instructor and students
- Length of seminar can vary by topic and/or grouped together in half or full day programs

Instructors

Resumes with qualifications and work experience of our instructors can be provided upon request.

Address, Contact and Profile Information

Virginia Office

6800 Versar Center, Suite 450
Springfield, VA 22151-4177
Tel: 703-256-4220 Fax 703-642-1088

Texas Office

207 Mandalay Canal
Irving, Texas 75039
Tel: 469-567-0923

POC:

Albert C. Zapanta, President/CEO - zapantaz@planprograms.com
Marc Tripp, Sr. Vice President/COO - marc@planprograms.com
Paola Bolasny, Program Manager - paola@planprograms.com

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