

Planning, Inc.

Training • Leadership • Security

Service Disabled Veteran Owned

www.planprograms.com



CAPABILITIES STATEMENT Retirement Training Seminars

I. Introduction

Planning, Inc. is a minority-owned, service-disabled veteran-owned small business specializing in human resource consultation, training, security services, and payroll delivery. We have been in business since 1982, providing education to U.S. government agency employees on federal retirement benefits, financial and estate planning, health and wellness, transition planning, leadership development training, and succession planning.

On January 1st, 2023, The U.S. Small Business Administration Certified Planning, Inc. as a Service-Disabled Veteran Owned Small Business. An SDVOSB certification allows the government agency the opportunity to award Planning, Inc. sole-source and set-aside contracts across the federal government.

II. Offered Services

Retirement Training Seminars:

Our Training seminars are conducted by skilled subject matter experts with over 30 years of experience from public and private service and provide customized or off-the-shelf training. 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 specifically designed modules (seminar length and topics selected by agencies). We can deliver seminars in-person or virtually via Adobe Connect.

Examples include:

- *Federal Retirement Benefits* – CSRS and/or FERS Benefits as applicable - inclusive of FERS/RAE and FERS/FRAE; FEHB; FEGLI; FSAFEDS; FEDVIP; FLTCIP; Social Security and Medicare.
- *Financial and Tax Planning* – Financial Goals; Budgets; Consumer Credit Management; Risk vs. Reward; the TSP; Investing Beyond the TSP; Maximizing Savings; Insurances – types and needs; 529 Plans; Other Savings; Tax Planning Strategies; etc.
- *Estate Planning* – Planning for incapacity: Powers of Attorney, Living Wills and Advance Medical Directives. Ownership of property, the probate process and the importance of Trusts. Estate, inheritance and gift taxes.
- *Health and Wellness* – Stress Management; Nutrition; Fitness for Life
- *Transition Planning* – Psychological Aspects of Change; Forging New Identities; Preparing for the Next Phase of Life; Interests; Skills; Abilities; Mentoring, Volunteering, etc.

- *Work Life Balance* – Practical information; Working from Home; Multitasking; Stress Factors.

Current Contracts:

- Contract # HM047613F0242 National Geospatial-Intelligence Agency (Issued August 7, 2019, 1 Base year, 4 1-year options)
- Contract # 2031JW20F000144 Office of the Comptroller of the Currency (Issued July 22, 2020, 1 Base year, 4 1-year options)
- Contract # NCUA23A00001 National Credit Union Administration (Issued January 1, 2023, 1 Base year, 4 1-year options)
- Contract # 2043FY-23-F-00054 IRS (Issued June 29, 2023, 1 Base year, 3 1-year options)
- Contract # 12319823P0010 USDA (Issued September 29, 2023, 1 Base year, 2 1-year options)

Previous Contracts:

- Contract #1333BJ22F00054004. United States Patent & Trademark Office, Retirement and Financial Literacy Seminars (Issued July 9, 2018, 1 Base year, 4 1-year options)
- Contract # 47HAA018A0209. General Services Administration OHRM, Early Career, Mid-Career and Pre-Retirement Planning Seminars (Issued March 14, 2022, 1 Base year, 4 1-year options)
- Contract #24617P2939 – VISN 6 VA Medical Centers, Federal Benefit Retirement Seminars (Issue April 2017, 1 Base year, 4 1-year options)
- Contract # CORHQ15C0574 – Federal Deposit Insurance Corporation DOA/ASB, Mid-Career and Pre-Retirement Planning Seminars. (Issue September 2015, 1 Base year, 4-1-year options).
- Contract # M0026418F0418 – United States Marine Corps, Retirement Planning Seminars (Issued August 2018, 1 Base year, 3-1-year options)
- Contract #541C80353/36C25018F2175 – VISN 10 VA Medical Centers, Federal Benefit Retirement Seminars (Issued April 2018, 64 Retirement Seminars)

III. Address, Contact and Profile Information

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<u>Business Size</u>	<u>Business Type</u>
Small/<\$7.0M	Corporate Entity (not tax-exempt) CVE-SBA VetCert Verified Service-Disabled, Veteran-Owned Small Business
NAICS Codes:	541612, 611430, 524292
GSA SCHEDULE	MAS (Formerly 783X)
GSA MAS	47QRAA24D00DB (Expiration September 5, 2029) Maximum Ordering Threshold (\$1,000,000) Federal Discount: .05% if paid within ten (10) days of invoice date Schedule Related Fees: .0075% (included in cost of seminar)
EIN:	52-2254450
DUNS:	196085997
CAGE:	1MZR5
UEI:	V1L2KFHCLSJ4
SAM:	Active -Valid through August 28, 2025