

FEDERAL RETIREMENT & FINANCIAL EDUCATION

CAPABILITY STATEMENT

CORE COMPETENCIES

Specialized education for federal employees designed to improve understanding of retirement benefits, financial readiness, and key benefit decisions. Programs can be delivered virtually or in person and tailored to employees at different stages of their federal careers.

- FERS & CSRS retirement education
- Thrift Savings Plan (TSP) education and retirement-readiness analysis
- FEGLI and federal benefits education
- Pre-retirement seminars and retirement income planning
- Financial wellness and financial literacy education
- Social Security considerations for federal employees
- Early-, mid- and late-career retirement readiness programs
- Virtual and in-person employee education

DIFFERENTIATORS

- Federal-employee-focused content rather than generic retirement education.
- Education integrates TSP, FERS/CSRS, FEGLI and retirement-income considerations.
- Programs can be customized for an agency's workforce and delivered at scale.
- Clear, educational approach intended to help employees make better-informed benefit and retirement decisions.
- Flexible delivery for webinars, workshops, seminars and employee financial-wellness initiatives.

RELEVANT FEDERAL REQUIREMENTS

Agency	Relevant Requirement / Market Signal
USDA	2026 procurement for Financial Literacy, Retirement and Thrift Savings Plan eLearning course content.
Dept. of Commerce	2026 small-business market research covering CSRS/FERS, TSP, Social Security, FEGLI and retirement/benefits education.
U.S. Army	Requirement for CSRS/FERS pre-retirement seminars, financial/tax planning and financial-literacy training.

COMPANY INFORMATION

Legal Business Name	Internal Benefit Advisors
UEI	Z2KUSGG5J1N6
CAGE Code	8D9H8
SAM.gov Status	ACTIVE SINCE 2019
Primary NAICS	611430 — Professional and Management Development Training
Additional NAICS / PSC	NAICS 524210 — Insurance Agencies and Brokerages PSC U004 — Education/Training: Scientific/Management PSC U008 — Education/Training: Training/Curriculum Development PSC U009 — Education/Training: General
Business Classification	Women-Owned Small Business (WOSB)
Service Area	Nationwide / Virtual and In-Person

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Past Performance ready upon request.

Federal Retirement • TSP • FERS/CSRS • FEGLI • Financial Wellness