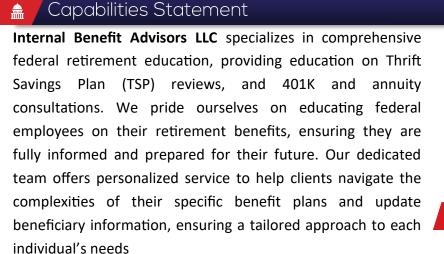


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Core Competencies

- Retirement Paperwork
- Individualized Counseling Session
- Thrift Savings Program
- * Fegli Coverage
- TSP Seminars
- FERS Employees
- ❖ CSRS Employees
- Special Provision
- Federal Retirement Planning
- Beneficiary Updates and Documentation
- 401K and Annuity Consultation
- Education on Retirement Benefit Programs







Differentiators

- Comprehensive education on retirement benefits to enhance understanding and preparedness.
- A dedicated team with over 20 years of experience in federal employee benefit plans.
- Personalized service that aligns with individual financial goals and retirement plans.
- * A strong commitment to client empowerment through financial literacy.
- Exclusive focus on federal and state employees, providing niche expertise.



Corporate Data

CAGE: 8D9H8 | UEI: Z2KUSGG5J1N6

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Work Area: Temecula, California, United States

Socio-Economic Status: EDWOSB, WOSB

NAICS: 541611(**P**), 524298, 541612, 561611

PSC: R431, R499,R710, R799,U009, U099

Past Performance



Department of Air Force

Date(s): Feb 2024

Details: Employee benefits presentation to 56th Comptroller Squadron, Luke AFB



Department of Agriculture

Date(s): Feb 2024

Details: Employee benefits presentation on behalf of National Association of Credit

Specialists



U.S. Postal Office Date(s): Nov 2023

Details: Federal Retirement Benefits

Presentation



Department of Homeland Security

Date(s): Nov 2023

Details: Federal Retirement Benefits

Presentation



Federal Aviation Administration

Date(s): Nov 2023

Details: Federal Retirement Benefits

Presentation