CAPABILITY STATEMENT

Federal Benefits Institute, LLC
10210 Frankford, Ave. Suite 220
Lubbock, TX 79424

Unique Entity ID:
YHG7ANKJG6S1

CAGE Code:9ZZ18

COMPANY OVERVIEW

Federal Benefits Institute is committed to a client-first philosophy, ensuring that government agencies have the resources and knowledge to empower their employees in making informed financial decisions. Since 2001, we have specialized in the federal employee market, providing comprehensive education to help agencies maximize employee benefits for secure and successful retirements.

CORE COMPETENCIES

- Comprehensive Benefits Education: Expert guidance on federal benefits and retirement planning.
- Personalized Financial Strategies: Tailored solutions for individual client needs.
- Legacy and Wealth Management: Long-term planning focused on preservation and growth.

PAST PERFORMANCE

- Army Corp of Engineers
- Defense Logistics Agency (DLA)
- Department of Defense (DoD)
- Department of Homeland Security (DHS)
- Fish and Wildlife
- Health and Human Services
- Immigration and Customs Enforcement (ICE)
- Secret Service
- Social Security Administration (SSA)
- Transportation Security Administration (TSA)
- US Air Force
- US Department of Agriculture, US Forest Service (USDA)
- US Marshalls
- US Navy
- US Postal Service (USPS)
- Veterans Affairs (VA)
- Veterans Administration (VA)

NAICS CODES

- **541612** - HUMAN RESOURCES CONSULTING SERVICES
- **523940** - PORTFOLIO MANAGEMENT AND INVESTMENT ADVICE
- **524292** - PHARMACY BENEFIT MANAGEMENT AND OTHER THIRD-PARTY ADMINISTRATION OF INSURANCE AND PENSION FUNDS
- **525110** - PENSION FUNDS
- **525120** - HEALTH AND WELFARE FUNDS
- **541611** - ADMINISTRATIVE MANAGEMENT AND GENERAL MANAGEMENT CONSULTING SERVICES

AREAS OF EXPERTISE

- CSRS/FERS Retirement Eligibility & Annuity Calculations
- Survivor Annuity Options & Alternatives
- Prior Military Service Buy-Back
- TSP: Pre-Retirement & Post-Retirement
- Social Security Benefits
- Federal Employee Group Life Insurance
- Federal Employee Health Benefits & Medicare

DIFFERENTIATORS

- Client-centered, personalized approach
- Extensive experience in federal employee benefits
- Comprehensive wealth management strategies
- Educates, trains, and empowers federal employees with financial literacy training

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