

General Services Administration

Authorized Federal Supply Schedule Price List



Schedule Title: Mission Orientated Business Integrated Services (MOBIS)

FSC Group: 87 – Contract Number: GS-02F-075BA

For more information on ordering from Federal Supply Schedules click on FSS Schedules at www.fss.gsa.gov

Contracting Period: February 5, 2014 – February 5, 2019

First Command Financial Services

1 FirstComm Plaza
Fort Worth, TX 76109
817.217.4874 Main
817.569.2444 Fax
www.firstcommand.com

Contract Administrator:

Esau Williamson
Vice President, Business Development

1 FirstComm Plaza
Fort Worth, TX 76109
Telephone: 817.217.4874 Fax: 817.569.2444

Business Size: Other than Small Business Email: businessdevelopmentinbox@firstcommand.com

On-line access to contract ordering information, terms and conditions, up-to-date pricing, and the opinion to create an electronic delivery order are available through GSA Advantage!, a menu-driven database system. The Internet address for GSA Advantage is: gsaadvantage.gov.

CUSTOMER INFORMATION PAGE

1. a. SIN 874-4: Instructor led training and education courses
b. See attachment 1 for pricing
c. Not applicable
2. Maximum order: \$1,000,000
3. Minimum order: \$100
4. Geographic coverage (delivery area): worldwide
5. Points of production (city, county, and state, or foreign country): The services First Command Financial Services provides are given at the customer's location.
6. Discount from list prices or statement of net prices: Two percent discount for GSA customers and are inclusive in net prices.
7. Quality discounts: Twenty percent discount for attendees above 50 per seminar; price discounted from \$25 to \$20 per attendee.
8. Prompt payment terms: none
9. a. Notification whether Government purchase cards are accepted at or below the micro-purchase threshold: Yes
b. Notification whether Government purchase cards are accepted or not accepted above the micro-purchase threshold: Yes
10. Foreign items: Not Applicable

11. a. **Time of Delivery:** Thirty days; can be negotiated at task order level.
 - b. **Expedited delivery:** Ten days.
 - c. **Overnight and 2-day delivery:** Overnight delivery is not available for these services
 - d. **Urgent Requirements:** See contract clause I-FSS-140-B. Agencies can contact the Contract Administrator to obtain faster delivery.
12. F.O.B point(s): Federal agency installations
13. a. **Ordering address(es):**
First Command Financial Services
Attn: Business Development
1 FirstComm Plaza
Fort Worth, TX 76109
- b. **Ordering Procedures:** For supplies and services, the ordering procedures, information on blanket purchase agreements (BPAs), and a sample BPA can be found at the GSA/FSS schedule homepage (fss.gsa.gov/schedules)
14. Payment address(es):
First Command Financial Services
Attn: Business Development
1 FirstComm Plaza
Fort Worth, TX 76109
15. Warranty provision: Not applicable
16. Export packing charges: Not applicable
17. Terms and conditions of Government purchase card acceptance (any thresholds above the micro purchase level):
Not applicable
18. Terms and conditions of rental, maintenance, and repair: Not applicable
19. Terms and conditions of installation: Not applicable
20. a. Terms and conditions of repair parts: Not applicable
b. Terms and conditions for any other services: Not applicable
21. List of services and distribution points: Not applicable
22. List of participating dealers: Not applicable
23. Preventative maintenance: Not applicable
24. a. Special attributes such as environmental attributes: Not applicable
b. If applicable, indicate that Section 508 compliance information is available on Electronic and Information Technology (EIT) supplies and services and show where full details and be found: Not Applicable
25. Data Universal Number System (DUNS) number: 039708768
26. Notification regarding registration in Central Contract Registration (CCR) database: Registered in System for Award Management (SAM) database, through 10/24/2014



General Services Administration

Awarded Contract Price List (874-4)



Seminar Titles	Course Length	Maximum Attendees*	GSA Price
CSRS or FERS (including Special Provisions) for Early, Mid-Career or Pre-Retirement	Half-Day	50	\$1,470.00
CSRS or FERS (including Special Provisions) for Early, Mid-Career or Pre-Retirement	1-Day	50	\$2,058.00
CSRS or FERS (including Special Provisions) for Early, Mid-Career or Pre-Retirement with Financial Planning	1 ½-Day	50	\$2,940.00
CSRS or FERS (including Special Provisions) for Early, Mid-Career or Pre-Retirement with Financial &	2-Day	50	\$3,430.00
CSRS or FERS (including Special Provisions) for Early, Mid-Career or Pre-Retirement with Financial &	3-Day	50	\$4,998.00
CSRS and FERS (including Special Provisions) for Early, Mid-Career or Pre-Retirement with Financial &	4-Day	50	\$6,566.00
TSP with Financial Planning	1-Day	50	\$2,058.00
*Additional cost per person above 50 attendees		N/A	\$20.00

COURSE DESCRIPTIONS

- Civil Service Retirement System (CSRS) Pre-Retirement Seminar:** This course is designed for CSRS employees that are eligible for retirement in the next five years. The course will cover the main elements of CSRS to include how to compute the basic CSRS annuity and survivor benefits; Voluntary Contribution Program; Thrift Savings Plan with Roth Option; Health Benefits; Social Security; Federal Employee Group Life Insurance; Long-Term Care and a brief overview of Financial Planning. The course will also address Special Provisions for Law Enforcement Officers, Fire Fighters and Air Traffic Controllers when necessary. Multiple day seminars include Retirement and Financial Planning. Four day seminars are a combination of two 3-day CSRS and FERS seminars with one group (CSRS or FERS) attending days 1-3 and the second group (FERS or CSRS) attending days 2-4. Common CSRS and FERS federal benefits and retirement planning are conducted on days 2 and 3.
- Federal Employee Retirement System (FERS) Pre-Retirement Seminar:** This course is designed for FERS employees that are eligible for retirement in the next five years. The course will cover the main elements of FERS to include how to compute the basic FERS annuity and survivor benefits; Thrift Savings Plan with Roth Option; Health

Benefits; Social Security; Federal Employee Group Life Insurance; Long-Term Care and a brief overview of Financial Planning. The course will also address Special Provisions for Law Enforcement Officers, Fire Fighters and Air Traffic Controllers when necessary. Multiple day seminars include Retirement and Financial Planning. Four day seminars are a combination of two 3-day CSRS and FERS seminars with one group (CSRS or FERS) attending days 1-3 and the second group (FERS or CSRS) attending days 2-4. Common CSRS and FERS federal benefits and retirement planning are conducted on days 2 and 3.

- 3. Federal Employee Retirement System (FERS) Mid-Career Seminar:** This course is designed for FERS employees that have at least 10 years of federal service. The course will cover the main elements of FERS to include how to compute the basic FERS annuity and survivor benefits; Thrift Savings Plan with Roth Option; Health Benefits; Social Security; Federal Employee Group Life Insurance; Long-Term Care and a brief overview of Financial Planning. The course will also address Special Provisions for Law Enforcement Officers, Fire Fighters and Air Traffic Controllers when necessary. Multiple day seminars include Retirement and Financial Planning.
- 4. Federal Employee Retirement System (FERS) Early-Career Seminar:** This course is designed for FERS employees that have less than ten years of federal service. The course will cover the main elements of FERS to include how to compute the basic FERS annuity and survivor benefits; Thrift Savings Plan with Roth Option and importance of matching contributions; Planning for retirement; Health Benefits; Social Security; Federal Employee Group Life Insurance; Long-Term Care; overview of Financial Planning. The course will also address Special Provisions for Law Enforcement Officers, Fire Fighters and Air Traffic Controllers when necessary.
- 5. Thrift Savings Plan (TSP) and Financial Retirement Planning:** This course is designed for all federal employees. The course will cover the main elements of Retirement Planning, TSP with Roth Option and integrates the TSP into an overall financial/retirement plan. The course includes Retirement Planning life stages; budgeting and calculating retirement income streams; investment options available in the TSP; risks associated with each investment option; how the TSP fits into CSRS and FERS retirement benefits; benefits of enrolling; earnings potential; matching funds; fund descriptions; vesting; loans; withdrawals and beneficiary information.



Our History. Our Mission



For more than 50 years, First Command has been dedicated to enhancing the financial well-being of our clients.

Our history of serving the financial planning needs of American families begins in the early 1950s, when Air Force Lt. Col. Carroll Payne had the occasion to work closely with the families of several crew members killed in an aircraft accident. Saddened by the survivors' financial difficulties and eager to help other military families effectively plan for their financial futures, Lt. Col. Payne began laying the groundwork for the company he would organize in 1958 and which would grow to become First Command.

Today, First Command provides not only financial solutions for military professionals and their families, but we extend our 50 years of experience to the delivery of financial solutions for federal employees through our federal benefits, financial, and retirement planning programs. We're fluent in the programs that are important in your financial life: CSRS and FERS, TSP, FEGLI and more. And, we understand the challenges facing federal employees today: frozen pay, reductions in force, and an increasing burden to fund their retirement.

Our speakers provide a full range of seminars tailored to early, mid-career, and pre-retirement federal employees as well as specializing in provisions addressing law enforcement, fire fighters, and air traffic controllers federal benefits. Because of our flexible and informative seminars, First Command has become a trusted resource to federal agency human resources departments worldwide.

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