GENERAL SERVICES ADMINISTRATION
 Federal Supply Service
 Authorized Federal Supply Schedule Price List

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

Human Capital Management and Administrative Support Services

Schedule for – Multiple Award Schedule
Contract Number: GS-02F-0154W
Contract Period: April 19, 2015 – April 18, 2025

Price list current as of mass mod# A824 8/24/202

Wienken Advisors, Ltd.
5001 Louise Drive, Suite 300
Mechanicsburg, PA 17055
Chris Lenz
clenz@financialguide.com
Telephone: (717) 791-3390 Fax: (717) 790-9151
Small Business

For more information on ordering from Federal Supply schedules click on the FSS Schedules button at http://fss.gsa.gov. On-line access to contract ordering information, terms and conditions, up-to-date pricing, and the option to create an electronic delivery order is available through GSA Advantage!TM, a menu-driven database system. The website for GSA Advantage!TM is: http://www.gsaadvantage.gov.
**CUSTOMER INFORMATION:**

1a. **TABLE OF AWARDED SPECIAL ITEM NUMBERS (SINs)**

<table>
<thead>
<tr>
<th>SIN</th>
<th>DESCRIPTION</th>
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<tbody>
<tr>
<td>541612HC</td>
<td>Agency Human Capital Strategy, policy, and Operational Planning</td>
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<td>524292</td>
<td>Separation &amp; Retirement</td>
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<tr>
<td>OLM</td>
<td>Order-Level Materials (OLMs)</td>
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</table>

1b. **LOWEST PRICED MODEL NUMBER AND PRICE FOR EACH SIN:**

(Government net price based on a unit of one)

n/a

1c. **HOURLY RATES (Services only):**

Please see Price List on page 12

2. **MAXIMUM ORDER:** $1,000,000

NOTE TO ORDERING ACTIVITIES: *If the best value selection places your order over the Maximum Order identified in this catalog/pricelist, you have an opportunity to obtain a better schedule contract price. Before placing your order, contact the aforementioned contactor for a better price. The contractor may (1) offer a new price for this requirement (2) offer the lowest price available under this contract or (3) decline the order. A delivery order that exceeds the maximum order may be placed under the schedule contract in accordance with FAR 8.404.*

3. **MINIMUM ORDER:** $100

4. **GEOGRAPHIC COVERAGE:** 48 contiguous states and the District of Columbia.

5. **POINT(S) OF PRODUCTION:** United States

6. **DISCOUNT FROM LIST PRICES:** *GSA Net Prices are shown on the attached GSA Pricelist. Negotiated discount has been applied and the IFF has been added.*

7. **QUANTITY DISCOUNT(S):** For all courses, an additional 5% volume discount is available for orders over $20,000

8. **PROMPT PAYMENT TERMS:** Net 30 days. Prompt payment terms cannot be negotiated out of the contractual agreement in exchange for other concessions.

9.a Government Purchase Cards must be accepted at or below the micro-purchase threshold.

9.b Government Purchase Cards are accepted above the micro-purchase threshold. Contact contractor for limit.
10. **FOREIGN ITEMS:** N/A

11a. **TIME OF DELIVERY:** Specified at the task order level

11b. **EXPEDITED DELIVERY:** Items available for expedited delivery are noted in this price list or negotiated at the task order level.

11c. **OVERNIGHT AND 2-DAY DELIVERY:** N/A

11d. **URGENT REQUIREMENTS:** Agencies can contact the Contractor’s representative to affect a faster delivery. Customers are encouraged to contact the contractor for the purpose of requesting accelerated delivery.

12. **FOB POINT:** Destination

13a. **ORDERING ADDRESS:** Same as contractor

13b. **ORDERING PROCEDURES:** Ordering activities shall use the ordering procedures described in Federal Acquisition Regulation 8.405-3 when placing an order or establishing a BPA for supplies or services. The ordering procedures, information on Blanket Purchase Agreements (BPA’s) and a sample BPA can be found at the GSA/FSS Schedule Homepage (fss.gsa.gov/schedules).

14. **PAYMENT ADDRESS:** Same as contractor

15. **WARRANTY PROVISION:** N/A

16. **EXPORT PACKING CHARGES:** Not applicable

17. **TERMS AND CONDITIONS OF GOVERNMENT PURCHASE CARD ACCEPTANCE:** (any thresholds above the micro purchase level may be inserted by contractor)

18. **TERMS AND CONDITIONS OF RENTAL, MAINTENANCE, AND REPAIR (IF APPLICABLE):**
   N/A

19. **TERMS AND CONDITIONS OF INSTALLATION (IF APPLICABLE):** N/A

20. **TERMS AND CONDITIONS OF REPAIR PARTS INDICATING DATE OF PARTS PRICE LISTS AND ANY DISCOUNTS FROM LIST PRICES (IF AVAILABLE):** N/A

20a. **TERMS AND CONDITIONS FOR ANY OTHER SERVICES (IF APPLICABLE):** N/A

21. **LIST OF SERVICE AND DISTRIBUTION POINTS (IF APPLICABLE):** N/A

22. **LIST OF PARTICIPATING DEALERS (IF APPLICABLE):** N/A

23. **PREVENTIVE MAINTENANCE (IF APPLICABLE):** N/A

24a. **SPECIAL ATTRIBUTES SUCH AS ENVIRONMENTAL ATTRIBUTES (e.g. recycled content, energy efficiency, and/or reduced pollutants):** N/A

24b. **Section 508 Compliance for Electronic and Information Technology (EIT):** Section 508 compliance information on the supplies and services in this contract are available at the following website
address (URL): [http://www.kikoda.com/]

The EIT standard can be found at: www.Section508.gov.

25. **DUNS NUMBER:** 826756657 and **CAGE CODE:** 53NX3

26. **NOTIFICATION REGARDING REGISTRATION IN SYSTEM FOR AWARD MANAGEMENT (SAM) DATABASE:** Contractor has an Active Registration in the SAM database.
Presenter Qualifications and Resumes

Wienken Advisors, Ltd. has a unique approach to conducting benefit education seminars. We deliver a complete analysis of the Federal Employee Benefit package within the framework of the Financial Planning Model, currently used in our firm. This model is known as “Building Your Financial Home” and we expand upon the premise that building financial security is a process like building a house. Since a greater number of people learn visually, we provide this one-page planning model kept in front of each student, throughout the program. Our concept enables the student to incorporate their benefits into their own personal financial plan.

The following experienced individuals are our presenters. They not only have a background in federal benefits, but also in personal finance and planning.

Christopher J. Lenz, ChFEBC™ – Primary Presenter; Owner and CEO.

Christopher has been in the financial services industry since 1989, counseling and advising federal employees and federal contractors. Christopher has been conducting benefit and financial education programs since 1993. He received the prestigious Chartered Federal Employee Benefit Consultant™ (ChFEBC™) designation in 2004 and along with Mr. George Snook, was one of the first individuals to receive this honor. Christopher spends 120 days a year traveling the country, speaking to thousands of people on Federal and Employer Benefits. He also donates his time speaking at NARFE events in the area on financial literacy. Christopher also sat on an advisory panel for TSP as they were creating their plans to offer the Roth option to federal employees. Christopher currently spends additional time coaching middle school football and basketball at St. Joseph’s School in Mechanicsburg, PA and is the father of five grown children. He has also coached AAU basketball since 2003.

George Snook, ChFEBC™ – Primary Presenter; Senior Advisor, Wienken Advisors, Ltd.

George has been in the financial services industry since 1996, counseling and advising government employees at the state and federal level. George has been conducting benefit and financial education programs since 1998. He received the prestigious Chartered Federal Employee Benefit Consultant™ (ChFEBC™) designation in 2004 and was one of the first individuals in the state of Pennsylvania to receive this honor. George was a wrestling coach at Mechanicsburg High School for seven years and currently sits on the board of the National High School Coaches Association.

Byron J. Dunlap, ChFEBC™ – Primary Presenter; Partner, Wienken Advisors, Ltd.

Byron was educated at the University of Virginia with a major in Economics. He was recruited to UVA on a wrestling scholarship and wrestled in the ACC all four years. After graduation, Byron was an analyst for Goldman Sachs Hedge funds through SEI Investments. He later worked with annuities at Lincoln Financial Group. Since 2008, Byron has held the Chartered Federal Employee Benefit Consultant™ (ChFEBC™) designation working to help educate Federal employees on their benefits and planning for their financial futures. Byron is married with two sons, Cole and Ethan. He spends his free time golfing and fishing.
James Thomas, ChFEBC℠ - Member

Jamie has worked in the financial services industry starting as an intern in 2004. He graduated from Shippensburg University in 2006, and immediately started full time. He enjoys meeting with people and helping them achieve their life goals. One of his passions in life is coaching kids in wrestling. He has been a wrestling coach at Cumberland Valley since 2006. He currently is living in the Camp Hill area with his wife Tressa, two dogs and a cat.

Derek Snider, ChFEBC℠ - Member – Primary Presenter

Derek Snider knows it takes consistent dedication if one is to achieve his goals. Graduating Summa Cum Laude from West Virginia University (WVU) with a Bachelor’s degree in Business Administration, Derek applies the same devotion and business acumen towards the financial and insurance strategy work he does with his clients today. In addition, Derek also holds the Chartered Federal Employee Benefit Consultant (ChFEBC) designation and along with his business partners, provide financial education and guidance to federal employees at nearly 80 government agencies around the country. When asked what drives his work ethic and dedication his answer is simple – “My goal is to make sure every client is adequately prepared for the retirement they desire, and life can constantly throw curveballs at them along the way, so my work is never done.” Derek grew up in the city of Buckhannon, WV. Upon his graduation from WVU in 2006, Derek started his career in financial services and has since helped thousands of federal employees retire prepared. Today, Derek lives in New Cumberland, PA, with his wife, Melinda, and their sons, Royce and Brennan.

Thomas Weber, ChFEBC℠ - Primary Presenter

Tom began his professional career as a general manager at a well-known, high-end steakhouse chain. His interest in financial services started with life insurance purchased as part of the planning process for himself, his wife and their children. It was then that he decided to pursue a career as a financial advisor. He has been working in the financial services industry since 2009 and teaching with Wienken for a year. Tom resides in Halifax, PA, with his wife Lori and their three young children. Tom and Lori are both very involved in the local schools; Lori works for the school system and Tom is School Board Director.

Pete Riley – ChFEBC™ - Primary Presenter

Pete graduated with a Bachelor of Science in Communications/Public Relations from Millersville University in 1989. He began his financial planning career in 1991. He was the owner and founder of Riley Financial Services established in 2006, specializing in estate and retirement planning. He received the Registered Financial Consultant (RFC) designation in 2007 from Kaplan University. In addition, Pete holds the Chartered Federal Employee Benefit Consultant™ (ChFEBC™) designation. He came to Wienken Advisors, Ltd. in early 2017, helping to conduct and present federal seminars. Pete has been married since 1992 and has three girls and in his spare time is the head wrestling coach at Linganore High School.
Wienken Advisors, LTD has been educating federal employees on their benefits through seminar outreach programs financial service agencies in the United States. With six associates having the prestigious Chartered Federal Employee Benefit Consultant™ (ChFEBC™) designation, this affords us the ability to educate federal employees in leveraging their benefits while planning for retirement and their financial future.

We teach 120 days a year, attended by an average of 3-4 thousand federal employees.

**Seminar Topic and Content**

**1 Day Seminars**

CSRS Pre-Retirement Seminar

The Planning for Retirement seminar provides participants with a detailed understanding they are entitled to under the Civil Service Retirement System (CSRS), Social Security, Medicare, the Thrift Savings Plan, Federal Employees Health Benefits program (FEHB), Long Term Care Insurance, the Federal Employee Group Life Insurance program (FEGLI), and the Flexible Spending Account program focuses on employees who are approximately within 5 years of retirement.

FERS Pre-Retirement Seminar

The Planning for Retirement seminar provides participants with a detailed understanding they are entitled to under the Federal Employee Retirement System (FERS), Social Security, Medicare, the Thrift Savings Plan, Federal Employees Health Benefits program (FEHB), Long Term Care Insurance, the Federal Employee Group Life Insurance program (FEGLI), and the Flexible Spending Account program focuses on employees who are approximately within 5 years of retirement.

CSRS Mid-Career Seminar

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FERS New Hire Seminar

This seminar focuses on each employee benefit program (FERS, FEHB, FEGLI, LTC, Flexible Spending Accounts, and Social Security) and explains how each program works and how to receive the maximum
benefit from each program.

Orientation of Human Resources Staff

This seminar focuses on how each employee benefit program (FERS, FEHB, FEGLI, LTC, Flexible Spending Accounts, and Social Security) and explains how each program works and how to explain to employees how to receive the maximum benefit from each program.

2 Day Seminars

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3 Day Seminars

CSRS Pre-Retirement Seminar

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<table>
<thead>
<tr>
<th>SIN Proposed</th>
<th>Course Title</th>
<th>Course Length</th>
<th>Min. Participants</th>
<th>Max. Participants</th>
<th>Contractor or Customer Site</th>
<th>Domestic or Overseas</th>
<th>Commercial Price List (CPL) or Market Prices</th>
<th>Unit of Issue (e.g., Per Person Per Course)</th>
<th>Most Commerical Customer (MFC)*</th>
<th>Discount Offered to Commercial MFC(%*)</th>
<th>Commerte MFC Price</th>
<th>Most Federal Agency (MFC)**</th>
<th>Discount Offered to GSA</th>
<th>Price Offered to GSA (Excluding IFI)</th>
<th>Price Offered to GSA (Including IFI)</th>
<th>Additional Cost above Maximum of 25 students (per person)</th>
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<td>CSRS Pre-Retirement Seminar</td>
<td>1 Day</td>
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<td>Customer Site</td>
<td>Domestic Only</td>
<td>$2,500.00 Per Course</td>
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<td>$2,500.00</td>
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<td>0%</td>
<td>$7,500.00</td>
<td>All Federal Agencies</td>
<td>$7,500.00 24%</td>
<td>$5,700.00</td>
<td>$5,742.75</td>
<td>$150.25</td>
<td>5%</td>
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<td>541612HC &amp; 541612HC</td>
<td>FERS Mid-Career</td>
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<td>All Federal Agencies</td>
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<td>$5,700.00</td>
<td>$5,742.75</td>
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