

FEDERAL EMPLOYEE EDUCATIONAL PRESENTATIONS

CAPABILITIES STATEMENT

Joseph Donnantuoni | Certified Medicaid Planner (CMP)
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CORE CAPABILITIES

- Federal employee retirement seminars and webinars.
- FERS eligibility, service, retirement timing, and survivor considerations.
- TSP accumulation, beneficiary, withdrawal, and retirement-distribution education.
- FEGLI, Social Security, Medicare, and retirement-income education.
- Rule of 55 and 72(t) concepts when applicable.
- Nationwide virtual delivery; in-person programs by arrangement.

DIFFERENTIATORS

- 35+ years of financial-services experience; former NASD/FINRA examiner.
- FINRA Chair-qualified arbitrator with long-term arbitration experience.
- Recipient of an SEC Award in 2020 for \$124,000.
- Certified Medicaid Planner (CMP).

RELEVANT EXPERIENCE

Retirement-benefit and educational work has included federal employees associated with the U.S. Postal Service, Department of the Interior, Department of State, and Internal Revenue Service. No agency endorsement is implied.

PROGRAM DELIVERY

- 60-minute webinar: focused benefit topic.
- 90-minute seminar/webinar: core retirement-benefit overview.
- 2-hour workshop: expanded instruction, examples, and Q&A.;
- Customized session: scope and learning objectives adapted to agency requirements.

FEDERAL CONTRACTING INFORMATION

CAGE	23L38	UEI	VCBNBWKNAGE4
Business	Sole Proprietorship	Service Area	Nationwide virtual; in-person by arrangement

NAICS Codes: 541611, 611430, 611710

541611 - Administrative Management and General Management Consulting Services

611430 - Professional and Management Development Training

611710 - Educational Support Services

PSC Codes: U001, U004, U009, R406, R408

EDUCATIONAL PROGRAM

Programs may cover FERS, TSP, FEGLI, Social Security, Medicare, retirement-income considerations, and long-term-care planning. Detailed curriculum, learning objectives, program format, and supporting educational materials are available for legitimate agency and contracting review.

PROPRIETARY - DETAILED CURRICULUM PROVIDED UPON REQUEST

EDUCATIONAL SCOPE

Programs are independent educational presentations and are not represented as official OPM or employing-agency advice. Content may be tailored to an agency's requested scope. Individualized legal, tax, securities, insurance, or financial advice is outside an agency-sponsored seminar unless separately authorized and conducted under applicable requirements.