



6701 Democracy Boulevard, Suite 300  
Bethesda MD 20817-7500

Website: [BoxerAdvisors.com](http://BoxerAdvisors.com)

**Contact Information**

Kenneth M. Boxer, President  
Phone: (240) 355-1192  
Email: [kboxer@boxeradvisors.com](mailto:kboxer@boxeradvisors.com)

Alyssa Bozzi, Operations  
Phone: (860) 716-7812  
Email: [abozzi@boxeradvisors.com](mailto:abozzi@boxeradvisors.com)

**Contract Vehicles (Subcontractor)**

Access through partner firms:  
GSA FSS; GSA MAS; GSA OASIS; GSA  
IT 70; GSA 8(a) STARS III; HCaTS;  
NIHCATS-III; and PSS PRIME  
BPAs with DOE, DOC, DOI, GSA, and  
FDA

**Corporate Structure**

Small Business, S-Corp, LLC

**NAICS Codes**

611430	Professional & Management Development
541611	Administrative Management & General Management
541612	Human Resource Consulting Services

**Why Choose Boxer Advisors**

- Over 25 years of training, coaching & consulting experience.
- Team of 50+ coaches, trainers, consultants, instructional designers, and technical producers.
- Over 75 off-the-shelf training offerings.
- Services Federal Agencies and select for-profit and non-profit organizations.
- 80% repeat business.

**Boxer Advisors Results**

Formal ROI study found: “75% of individuals served said there were improvements in managers’ productivity, work group productivity, project completion team communications and service quality. Converting ONLY the tangible benefits to monetary value, results showed that the programs delivered a formal ROI of 70%, equaling approximately \$500,000 in dollars saved and/or productivity improvements after two years.”

**ABOUT BOXER ADVISORS**

Boxer Advisors, LLC is a certified small business engaged in providing professional development training, coaching, and consulting services to Federal agencies and select for-profit and non-profit organizations. We are a full-service firm that combines the resources and expertise of more than 50+ professional consultants, facilitators, and coaches. Collectively, our carefully selected partners have centuries of experience providing training and consulting services to the Federal government.

Our extensive experience with the Federal government ensures clients that we can provide quick start-ups and sustainable long-term programs. Lessons learned from previous engagements allow our team to anticipate and avoid problems experienced by others. Because of our team’s vast experiences, the learning curve is shorter, and the ability to grasp organization-specific issues is strong, thereby allowing us to quickly provide practical, tangible guidance.

**FEDERAL EMPLOYEES RETIREMENT SYSTEM TRAINING**

Federal Employee Retirement System (FERS) training is a vital component in ensuring the financial security and well-being of government employees. It was created by Congress in 1986 and became effective on January 1, 1987. While some employees may be covered under CSRS, most current civilian employees are covered by FERS.

With all the acronyms, it can be a confusing word salad of civil service retirement benefits. Although FERS is certainly designed to provide robust benefits, it’s easy to get lost in planning and executing a comprehensive retirement strategy. Understanding each of the individual puzzle pieces and how they work together is essential in planning for retirement. As of November 2024, the federal government employed over 3 million individuals, making it the nation's largest employer. With such a substantial workforce, it's imperative that employees are well-informed about their retirement benefits to make educated decisions about their futures.

In fiscal year 2023, approximately 108,387 federal employees retired, highlighting the significant number of individuals transitioning out of federal service annually. Despite the availability of retirement benefits, many employees lack a comprehensive understanding of their options. The Office of Personnel Management (OPM) has recognized this gap and developed a retirement financial literacy and education strategy aimed at educating federal employees on the necessity of retirement savings and investment.

Offering FERS training is not only beneficial for employees but also advantageous for government agencies. Educated employees are more likely to make timely and well-informed retirement decisions, facilitating smoother workforce planning and succession management. Moreover, a workforce confident in its retirement planning contributes to higher job satisfaction and productivity. Agencies that invest in such training demonstrate a commitment to their employees' futures, fostering loyalty and reducing turnover.

We are experts in Federal Employees Retirement System (FERS) training. We deliver customized, high-impact training solutions designed to equip professionals with the knowledge and skills to navigate, manage, and optimize retirement benefits under FERS. Our seasoned experts combine industry best practices, regulatory insights, and real-world case studies to provide engaging and actionable training programs.

**THE BOXER ADVANTAGE**

Boxer Advisors is uniquely positioned to deliver Federal Employee Retirement (FER) training with a strategic blend of expertise, experience, and tailored solutions. A key advantage of our approach is that our facilitators do not currently hold an investment license. This allows her to provide more objective, unbiased guidance without the pressure to promote specific financial products or investment decisions. As a result, participants receive information that is more personalized and relevant to their unique financial situations, empowering them to make informed retirement choices with confidence. With a deep understanding of federal benefits, retirement planning, and transition strategies, we customize training programs to address the unique needs of federal agencies and their employees. Our engaging, facilitation-driven approach enhances comprehension and retention, equipping employees with the knowledge and confidence to navigate their retirement journey effectively.



Boxer Advisors offers a range of federal retirement training, coaching and consulting support. We also provide access to an asynchronous training tool -- a menu of retirement training that is accessed on their own time, at their own pace. This tool provides access to micro-webinars to supplement learning. What follows is an overview of topics that we cover in our baseline federal retirement training session:

## FERS SEMINAR TOPICS

<p><b>The CSRS retirement system</b></p> <ul style="list-style-type: none"> <li>• Eligibility</li> <li>• Determining High-3</li> <li>• Computations</li> <li>• FERS Annuity Supplement</li> <li>• Disability benefits</li> <li>• Military deposits</li> <li>• Application for retirement</li> <li>• Processing your retirement</li> <li>• Survivor Benefits</li> <li>• Withholdings and taxation</li> </ul> <p><b>Social Security</b></p> <ul style="list-style-type: none"> <li>• Eligibility</li> <li>• Description of benefits</li> <li>• Survivor benefits</li> <li>• Benefits computation</li> <li>• Applying for benefits</li> </ul> <p><b>Thrift Savings Plan (TSP)</b></p> <ul style="list-style-type: none"> <li>• Employee/Employer contributions</li> <li>• Investment options/considerations (including Roth)</li> <li>• Withdrawal options at separation</li> <li>• Taxation of distributions</li> <li>• Death benefits / beneficiary</li> </ul> <p><b>FEGLI</b></p> <ul style="list-style-type: none"> <li>• Continuing into retirement</li> </ul>	<p><b>FEHB</b></p> <ul style="list-style-type: none"> <li>• Program features</li> <li>• Continuing coverage into retirement</li> <li>• Continued coverage for survivors</li> </ul> <p><b>Federal Dental and Vision Insurance</b></p> <ul style="list-style-type: none"> <li>• Coverage in retirement</li> <li>• Coverage for survivors</li> </ul> <p><b>Long Term Care</b></p> <ul style="list-style-type: none"> <li>• Coverage in retirement</li> <li>• Coverage for survivors</li> </ul> <p><b>Medicare</b></p> <ul style="list-style-type: none"> <li>• Description of coverage</li> <li>• Medicare's relationship with Federal Employees Health Benefits</li> <li>• Medicare premiums</li> </ul> <p><b>Tax &amp; Financial Considerations; Money Management/Financial Planning</b></p> <ul style="list-style-type: none"> <li>• Importance of starting early</li> <li>• Debt management</li> <li>• Income / expenses</li> <li>• Estate planning</li> <li>• Financial goals</li> <li>• Financial planners</li> <li>• IRAs</li> <li>• Mutual funds</li> <li>• Tax implications of retirement income</li> <li>• Adjusting to retirement</li> <li>• Working after retirement</li> </ul>
--	--

## SAMPLE CLIENT ENGAGEMENTS

Boxer Advisors has a proven track record of delivering high-impact Federal Employees Retirement System (FERS) training and consulting services to federal agencies. Through our strategic engagements, we have successfully guided agencies in enhancing retirement readiness, improving employee financial literacy, and streamlining retirement-related decision-making including Census, DFAS, DOE, DOT, FMSCA and SEC. The following sample client engagements highlight our ability to provide tailored, results-driven solutions that address the unique needs of federal employees and their agencies.

- Since 2020, we have successfully designed and delivered 45+ early-career, mid-career and late-career FERS training for thousands of employees at DFAS. Sessions provide participants with essential knowledge on retirement benefits, financial planning, and service credit considerations, empowering them to make informed decisions for a secure and well-prepared retirement.
- Delivered multiple FERS training sessions for more than 1000 DOE employees since 2018, helping to them to strengthen their retirement preparedness, increasing their financial awareness, and optimizing their retirement decision-making processes.
- Delivered Mid-Career FERS training for hundreds of U.S. Census employees.
- Designed and delivered three two-hour FERS webinars in response to the Deferred Resignation Program. The sessions provided critical information and essential guidance to over 1200 DOE employees, helping them understand what each option meant for their federal benefits, service credit and financial stability
- Designed and delivered "Transitioning into Retirement" training for FMSCA

## COMPANY SUMMARY

Boxer Advisors, LLC is a Maryland-based small business, centrally located to serve the Washington, DC, Virginia, Maryland corridor with access to consultants, coaches, facilitators, and trainers world-wide. Our firm offers:

- Decades of consulting, coaching & training experience
- 50+ certified OD consultants, coaches & trainers worldwide
- Over 75 standard training offerings
- Support to over 50+ Federal agencies and Fortune 1000 companies
- Level of measurable ROI to warrant an 80% repeat business rate

We collaborate with firms holding special designations, including SDVOSB, WOSB, and 8(a) certifications. Some of our trusted partners include Ascendant Global Leadership, Insight Management Consulting, Jefferson Consulting, LDSS, Piper Strategies, Piton Science & Technology, and PowerTrain.

## CLIENT TESTIMONIALS

Representative comments from the retirement training we have provided to our Federal clients:

"This was a fantastic class! I have taken it one other time in the past 5-6 years, and I really thought this instructor had the best background and passion to teach."

"The instructor has a lot of knowledge on all the topics for this class. She was able to give real life examples and was able to give a lot of complex info in an understandable manner. She is also very professional and a very good facilitator."

"Instructor was amazingly good - extremely knowledgeable, very personable, provided great illustrative examples, and great Q/A with attendees throughout the entire course - in sum, best instructor I've had for a training class."



## OUR PHILOSOPHY

Our philosophy is simple: we believe that the goal of every solution should be to improve the performance of an organization by enhancing the capabilities of its people.

## CORE COMPETENCIES

We offer a comprehensive single-source solution for training, coaching, and consulting. Armed with over 75 off-the-shelf training modules, we are equipped to help organizations strengthen their capabilities, develop their efficiencies, and energize their workplaces by teaching the skills that drive collaboration, strong execution, and productivity. Our team of highly specialized professionals brings strong, in-depth experience to our core capabilities including:

<b>Professional Development Training</b>	<b>Change Management Consulting</b>	<b>Employee Engagement Support</b>	<b>Coaching and Facilitation Services</b>
<ul style="list-style-type: none"> <li>• Executive Development</li> <li>• Leadership Development</li> <li>• Communication Skills</li> <li>• Customer Service</li> <li>• Project Management</li> <li>• Emotional Intelligence and Resilience</li> <li>• Self-Management</li> <li>• FERS Training</li> </ul>	<ul style="list-style-type: none"> <li>• Change Management Services</li> <li>• Communications Consulting</li> <li>• Core Competency Development</li> <li>• Organizational Development</li> <li>• Strategic Planning</li> <li>• Instructional Design Services</li> <li>• Team Building Services</li> <li>• Best Practices Research</li> </ul>	<ul style="list-style-type: none"> <li>• Engagement and Retention Training</li> <li>• Mentoring Training and Consulting</li> <li>• Career Development Training</li> <li>• Communication Support</li> <li>• Career and Pre-Retirement Training</li> <li>• ROI Assessments</li> </ul>	<ul style="list-style-type: none"> <li>• Executive Coaching</li> <li>• Action Learning Coaching</li> <li>• Career Coaching</li> <li>• Meeting Design and Facilitation</li> <li>• Seminars and Retreats</li> <li>• Train-the-Trainer</li> <li>• Individual Assessment Tools</li> </ul>

In offering these services to our clients, Boxer Advisors utilizes a disciplined, integrated professional team that is immediately available to provide services to our clients.

## BOXER ADVISORS' PARTNER FIRMS

We collaborate with firms holding special designations, including SDVOSB, WOSB, and 8(a) certifications.

## REPRESENTATIVE CLIENTS

Boxer Advisors brings superior performance and expertise in providing consulting, coaching and/or training solutions to Fortune 1000 companies, City, State, and local Government agencies, and over 50 Federal Agencies including the following select clients:

- |   |  |
|---|--|
| • Administration for Children and Families  | • Federal Motor Carrier Safety Administration    |
| • American Society for Microbiology   | • Federal Laboratory Consortium                  |
| • Arcfield  | • Federal Retirement Thrift Investment Board     |
| • BAE Systems   | • U.S. Food and Drug Administration              |
| • Bonneville Power Administration   | • General Services Administration                |
| • Capital One   | • Intelligence Community                         |
| • U.S. Census Bureau  | • Inter-American Development Bank                |
| • Center for Drug Evaluation and Research   | • International Trade Administration             |
| • Center for Food Safety and Applied Nutrition  | • Lockheed Martin                                |
| • Centers for Medicare & Medicaid Services  | • U.S. Marine Corps                              |
| • City of Chesapeake  | • Military Sealift Command                       |
| • U.S. Coast Guard  | • National Aeronautics and Space Administration  |
| • U.S. Commodity Futures Trading Commission   | • National Institutes of Health                  |
| • Constellation Energy  | • Office of Personnel Management                 |
| • Defense Finance Accounting Service  | • Pan American Health Organization               |
| • Defense Logistics Agency  | • U.S. Patent and Trademark Office               |
| • Department of the Army  | • Peace Corps                                    |
| • U.S. Departments of Agriculture, Defense, Energy, Health and Human Services, Homeland Security, Justice, Labor, Transportation and Veterans Affairs | • Prince George's County Government              |
| • U.S. Department of the Navy   | • U.S. Security Exchange Commission              |
| • EagleBank   | • U.S. Senate                                    |
| • Element Financial Corporation   | • Smithsonian Institution                        |
| • Environmental Protection Agency   | • Social Security Administration                 |
| • Federal Aviation Administration   | • Sodexo Worldwide                               |
| • Federal Bureau of Prisons   | • Washington Metropolitan Area Transit Authority |
|   | • World Bank Group                               |
|   | • World Health Organization                      |