

Knowledge • Advocacy • Credibility • Leadership



ASPPA's
Credentialing &
Education Programs

Why ASPPA?

ASPPA - the American Society of Pension Professionals & Actuaries - is the premier organization for career retirement plan professionals. Since its inception in 1966, ASPPA has carefully tracked the changing needs of the retirement plan industry and has been integral in preserving, shaping and enhancing our nation's private retirement plan system. Today, ASPPA is 6500+ members strong.

Why consider ASPPA's educational programs?

In recognition that knowledge is an essential component of career and industry advancement, ASPPA offers a variety of comprehensive educational programs. The curriculum, which provides both practical and scholastic content, is carefully enhanced and updated each year to address new industry trends, regulatory and legislative changes affecting the pension system and the work of retirement plan professionals.

- ▶ Coursework is developed by nationally-recognized industry experts and pension educators.
- ▶ ASPPA's educational programs are modular in design enabling you to customize your learning experience to reflect your specific learning objectives.
- ▶ ASPPA's educational programs are designed to provide a learning experience with high academic standards. Many courses are eligible for college credit and/or Continuing Education credit towards other credentials.
- ▶ ASPPA education and credentialing programs are highly respected in the industry and are in high demand in all facets of the retirement plan industry.

What kind of education does ASPPA offer?

ASPPA offers the following types of educational programs to meet the needs of the diverse and ever-changing retirement industry. All of these programs are developed and maintained by ASPPA with the assistance of leading industry professionals.

- ▶ Comprehensive Credentialing Programs;
- ▶ Regional and National Conferences;
- ▶ Web-based programs including webcasts and webcourses;
- ▶ Reference materials such as *The ERISA Outline Book*, course study guides, textbooks and sample exams; and
- ▶ Periodic publications including *The ASPPA Journal* and *ASPPA asaps*.

Who benefits from ASPPA's educational programs?

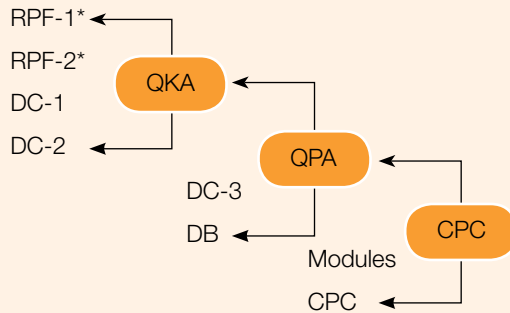
Everyone! Employers and career professionals, as well as plan sponsors and participants, all benefit from the value that ASPPA's educational programs bring to the industry. ASPPA is committed to ensuring that there will be highly educated, well-qualified retirement plan professionals in the years to come to support the private pension system. ASPPA offers retirement plan education and credentialing to career retirement industry individuals, such as:

- ▶ Actuaries
- ▶ Attorneys
- ▶ Consultants
- ▶ CPAs
- ▶ Financial Advisors
- ▶ Human Resource Professionals
- ▶ Marketing Professionals
- ▶ Plan Administrators
- ▶ Recordkeepers
- ▶ Sales Professionals
- ▶ Support Staff

Tell me more about the ASPPA Credentialing Programs.

ASPPA offers four credentialing tracks, supporting seven distinct credentials and two certificate programs, for retirement plan professionals. The coursework and examinations required for each credential are as follows:

Plan Administration, Compliance and Consulting Track

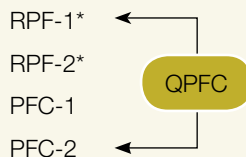


The Qualified 401(k) Administrator program (QKA) focuses on 401(k) plan recordkeeping, nondiscrimination testing and administrative aspects that 401(k) administrators need to know.

The Qualified Pension Administrator program (QPA) encompasses technical administration, compliance and reporting functions for all types of qualified plans.

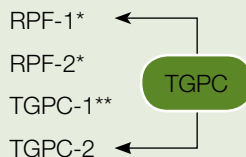
The Certified Pension Consultant program (CPC) covers all qualified plan aspects in great depth to provide the detailed knowledge that a plan consultant would utilize in areas of plan design, administration and in fulfilling departmental leadership roles for compliance, relationship management, plan documents and operations.

Financial Consulting Track



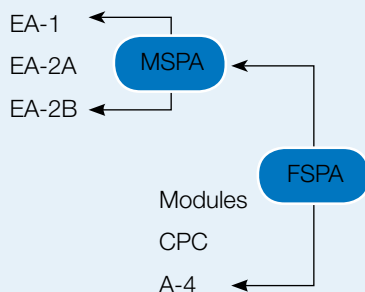
The Qualified Plan Financial Consultant program (QPFC) focuses primarily on the aspects of retirement planning, administration and regulatory requirements that consultants who provide plan design, sales, sales support or financial consulting need to know.

Tax-Exempt & Governmental Plan Administration, Compliance and Consulting Track



The Tax-Exempt & Governmental Plan Consultant (TGPC) program encompasses issues affecting the administration, sales and marketing aspects of 403(b), 457(b) and other plans maintained by tax-exempt and governmental entities.

Actuarial Consulting Track



The Member, Society of Pension Actuaries credential (MSPA) was created for individuals providing defined benefit or actuarial consulting who are currently Enrolled Actuaries in good standing.

The Fellow, Society of Pension Actuaries program (FSPA) was designed for MSPAs who wish to enhance their qualified plan analytical and consulting skills.

*Successful completion of RPF-1 and RPF-2 earns a candidate the Retirement Plan Fundamentals Certificate.

** Successful completion of TGPC-1 earns a candidate the Tax-exempt & Governmental Plan Administration Certificate.

What is required to obtain and maintain an ASPPA Credential?

In order to obtain an ASPPA credential, a candidate must successfully complete the relevant ASPPA exams and satisfy the specified license (if any) and experience requirements. (See program catalog for application and more details.)

Retirement Plan Fundamentals (RPF-1 and RPF-2) and Tax-Exempt & Governmental Plan Administration (TGPC-1) exams are administered online in open-book format; other exams are proctored and offered at local testing centers one to two times a year during applicable exam windows in the spring and fall.

A college degree is not required for an ASPPA credential; however, successful completion of certain ASPPA exams may qualify for college credit recognized by the American Council on Education (ACE).

Maintaining an ASPPA credential requires ongoing ASPPA membership in good standing. Credentialed members must also comply with ASPPA's continuing education requirements (40 hours every two years) and ASPPA's Code of Professional Conduct.

In addition to the previously mentioned credentialing programs, ASPPA also offers the APM (Associated Professional Member) credential. The APM is designed for retirement plan professionals who hold qualifying degrees or credentials in law, accounting, actuarial science, financial science, insurance or related disciplines who meet an experience requirement. Although no exams are required, APMs are also subject to ASPPA's continuing education and Professional Conduct requirements.

How do I get more information about ASPPA Credentialing and other educational opportunities?

Contact us directly at education@asppa.org or visit us at www.asppa.org/education for a complete listing of all that ASPPA has to offer.

Let ASPPA provide you with all of your educational needs.
Contact us today.

www.asppa.org



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