

If not, learn why  
there should be....



Is there  
an ASPPA member  
on your retirement  
planning team?



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## COMMITMENT

The management of a corporate 401(k) plan or other type of retirement plan entails a myriad of disciplines. Your retirement planning team must have knowledge of ERISA laws, IRS and DOL regulations, plan administration and compliance, actuarial calculations, employee communications, investments and fiduciary responsibilities. Since all of these areas evolve due to new laws, products and industry trends, it is important to align yourself with professionals who understand the dynamics of this ever-changing landscape. ASPPA credentialled professionals are **committed to providing optimal solutions** that avoid unnecessary risks in this diversified, technical and highly-regulated industry.

When your team includes ASPPA credentialled experts, you also receive the benefits and the **commitment of ASPPA—a nationally recognized authority** on our nation's employer-sponsored retirement plan system.

With so many choices and decisions with such long-term consequences, your commitment to include ASPPA credentialled professionals on your team is more important today than ever before.

## KNOWLEDGE AND INTEGRITY

Credentialled ASPPA members have committed a minimum of three years of study, rigorous examinations and actual practice to become highly skilled specialists in their respective areas of retirement planning.

ASPPA's extensive **credentialing program has a reputation for excellence** and includes continuing education requirements to ensure ongoing high standards of performance.

Representative of all disciplines in the retirement planning arena, ASPPA credentialled members' services include Plan Administration, Compliance and Consulting, Actuarial Consulting, and Financial and Legal Consulting.

ASPPA's strong **Code of Professional Conduct**, subscribed to by all ASPPA members, is a cornerstone of the organization. By coupling the highest levels of professional and ethical standards, ASPPA and its members offer you a winning combination.

## EXPERTISE

To ensure the highest levels of industry expertise and professional standards, look for these ASPPA credentialled professionals when assembling your retirement planning team.

### PLAN ADMINISTRATION, COMPLIANCE AND CONSULTING

#### **Qualified 401(k) Administrator - QKA**

Retirement plan professionals whose work is focused primarily on 401(k) plans. QKAs generally work with employers and consultants on the recordkeeping, non-discrimination testing and administrative aspects of 401(k) and other defined contribution plans.

#### **Qualified Pension Administrator - QPA**

Technical professionals focusing on qualified plan administration. QPAs perform functions such as determination of eligibility, computation of benefits, plan recordkeeping, compliance, trust accounting, reporting and disclosure. QPAs are well-versed in defined contribution and defined benefit plan administration.

#### **Certified Pension Consultant - CPC**

Benefits professionals working as advisors in plan administration, pension actuarial administration, insurance and financial planning. CPCs work alongside employers to formulate, implement, administer and maintain qualified retirement plans.

### ACTUARIAL CONSULTING

#### **Member, American Society of Pension Actuaries – MSPA**

Enrolled Actuaries who have at least three years of responsible actuarial experience. MSPAs specialize in defined benefit plan consulting and actuarial certifications.

#### **Fellow, American Society of Pension Actuaries – FSPA**

Qualified beyond the Enrolled Actuary status with proven analytical skills to provide actuarial services and consulting for all retirement plan types, FSPAs work alongside employers to formulate, implement, administer and maintain qualified retirement plans.

## FINANCIAL CONSULTING

### **Qualified Plan Financial Consultant – QPFC**

Accomplished financial professionals who specialize in retirement plans. QPFCs are typically financial advisors or investment professionals who hold other investment-related credentials and who have distinguished themselves in the retirement plan arena by earning the QPFC designation.

### PROFESSIONAL MEMBERS

#### **Associated Professional Member - APM**

Retirement plan professionals who have obtained other credentials related to law, accounting, actuarial science, financial science, insurance, or related disciplines. Professionals from these and other associated disciplines with a minimum of three years experience in retirement related activities are qualified to apply for APM membership without any ASPPA exam requirements.



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## ABOUT ASPPA

Since its inception in 1966, ASPPA, The American Society of Pension Professionals and Actuaries, has been integral in preserving, shaping and enhancing our nation's employer-sponsored retirement plan system. ASPPA membership is individual and encompasses a **network of professionals** dedicated to the security of the employer-sponsored retirement plan system.

Through its influential presence in Washington, DC and its dynamic, yet intensive, credentialing and continuing education programs, ASPPA has earned the distinct **reputation as the prominent voice** for the retirement plan industry.

ASPPA is the only organization comprised exclusively of retirement plan professionals that actively advocates for legislative and regulatory changes to expand and improve the private pension system. ASPPA's elite membership has grown to approximately 6000 retirement plan professionals who have chosen to be among the most dedicated in the profession and who take on retirement plan work as a career.

