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CERTIFIED PLAN SPONSOR PROFESSIONAL

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Advisor GUIDE



PSCA

Plan Sponsor Council of America

Part of the American Retirement Association

American Retirement Association

Based in the Washington, D.C. area, the American Retirement Association is a non-profit professional organization with two major goals: to educate all retirement plan and benefits professionals, and to create a framework of policy that gives every working American the ability to have a comfortable retirement.

As part of that mission, for more than half a century, the American Retirement Association has developed and distributed education programs, information resources, and professional credentials that have become the gold standard for retirement plan professionals in every field of endeavor.

More than 26,000 members strong, the American Retirement Association is comprised of five premier retirement industry associations:

- American Society of Pension Professionals & Actuaries (ASPPA)
- ASPPA College of Pension Actuaries (ACOPA)
- National Association of Plan Advisors (NAPA)
- National Tax-deferred Savings Association (NTSA)
- Plan Sponsor Council of America (PSCA)

Plan Sponsor Council of America (PSCA)

Since its founding in 1947, PSCA has been on the forefront of protecting the American retirement system, and is committed to improving workers' retirement security. Today, PSCA assists more than six million plan participants, and provides its members with programs and services to help them better manage their company's retirement plans.

The CPSP Program

The CPSP curriculum consists of three mastery-level courses, covering advanced concepts for retirement plan sponsors.

- **Course 1: Choosing Your Plan**
 - ♦ Considerations for Retirement Plan Design
 - ♦ The Most Popular Defined Contribution Plan: The 401(k)
 - ♦ Beyond the 401(k) (Other Types of Employer-Sponsored Retirement Plans)
- **Course 2: Building Your Plan**
 - ♦ Plan Fiduciary Obligations & Risk Management
 - ♦ Investment Concepts
 - ♦ Behavioral Finance & Employee Engagement
- **Course 3: Running Your Plan**
 - ♦ Vendor Management & Selection
 - ♦ Plan Operations
 - ♦ Plan Audits & Compliance

Credential Requirements

In order to earn the CPSP, candidates must have at least two years of experience in a benefits role, pass the exam and ascribe to the PSCA Professional Code of Conduct.

Exam Requirements

The CPSP exam is a 100-question online open-book exam. Candidates have 2.5 hours to complete the exam.

What is the Certified Plan Sponsor Professional (CPSP) Credential?

The PSCA Certified Plan Sponsor Professional (CPSP) Credential — developed by plan sponsors and some of the nation's leading retirement experts — provides plan sponsors with unique proof of their knowledge and skill in one of the nation's most challenging professions.

Through the CPSP, plan sponsors can improve and enhance their understanding of how to effectively evaluate, design, implement and manage a comprehensive employer-sponsored retirement plan.

Leveraging the latest in online education technology, the rigorous curriculum ensures plan sponsors have the knowledge they need to protect their organization from fiduciary risk and help secure their plan participants' retirement success.

Key Points for Marketing the CPSP to Your Clients and Prospects

- The CPSP Credential is the only of its kind available to plan sponsors today.
- The CPSP curriculum is extremely rigorous and covers a wide range of advanced topics.
- By completing the CPSP, a professional gains a strong understanding of how to effectively evaluate, design, implement and manage an employer-sponsored retirement plan.
- Non-PSCA members can only access the CPSP program via an enrollment code provided by an education partner, or CPFA or QPFC credentialed professional, like yourself.

Continuing Education

The CPSP program is approved for SHRM® Professional Development Credit (PDC) and HR Certification Institute® (HRCI) recertifications credits.

SHRM®: 13 PDC hours **HRCI®:** 9.75 hours