

Pension Administration Executive Summary

Barton Community College has provided training to CPI Qualified Plan Consultants for a number of years. In the past, only one certificate was offered for students in Barton's program. Due to changes in the American Society of Pension Professionals and Actuaries (ASPPA) industry certifications, Barton is pursuing the addition of two Stand Alone Parent Programs (SAPPs) and the revision of the existing SAPP.

New certificate offerings will follow the credentialing requirements of the American Society of Pension Professionals and Actuaries.

Retirement Plan Fundamentals Certificate (SAPP)

This new four hour SAPP Certificate will require the completion of the following two courses:

- BUSI 1812 – Retirement Plan Fundamentals I – 2 credit hours
- BUSI 1813 – Retirement Plan Fundamentals II – 2 credit hours

These courses are currently being taught at CPI and will allow students to receive the Retirement Plan Fundamentals SAPP from Barton Community College as well as the industry certification from ASPPA upon successful completion of the ASPPA industry standard tests for each course.

Tax Exempt & Governmental Plan Consultant Certificate (SAPP)

This new nine hour SAPP Certificate will require the completion of the following four courses:

- BUSI 1812 – Retirement Plan Fundamentals 1 – 2 credit hours
- BUSI 1813 – Retirement Plan Fundamentals 1 – 2 credit hours
- BUSI 1816 – Tax Exempt & Governmental Plan Administration (TGPC-1) – 2 credit hours
- BUSI 1817 – Tax Exempt & Governmental Plan Consultant -2 (TGPC2) – 3 credit hours

These courses are currently being taught at CPI and will allow students to receive the Tax Exempt & Governmental Plan Consultant SAPP from Barton Community College as well as the industry certification from ASPPA upon successful completion of the ASPPA industry standard tests for each course. For employees working in the Tax Exempt & Government Plan Consultant role at CPI, this is a stackable certificate, as the Retirement Plan Fundamental Certificate must be completed prior to the start of the TGPC courses.

Revision of Current Ten Hour Pension Administration Certificate (SAPP)

The revision of this certificate will be a title change only. The name of the SAPP will change from Pension Administration to Qualified 401(k) Administrator (QKA) Certificate. This title is in line with the title of the industry certification from ASPPA.

Courses will not change within the current SAPP and will continue to be as follows:

- BUSI 1812 – Retirement Plan Fundamentals I – 2 credit hours
- BUSI 1813 – Retirement Plan Fundamentals II – 2 credit hours
- BUSI 1608 – DC-1, Defined Contribution Administrative Issues – Basic Concepts – 3 credit hours
- BUSI 1609 – DC-2, Defined Contribution Administrative Issues – Compliance Issues – 3 credit hours

These courses are currently being taught at CPI. For employees at CPI, this is a stackable certificate, as the Retirement Plan Fundamental Certificate must be completed prior to the start of the DC-1 & DC-2 courses.

Respectively Submitted

Jane Howard

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