

Retirement Industry Specialists Create A Powerful New Partnership

Nine of the nation’s preeminent Third Party Administrator (TPA) consulting firms announced a new partnership today known as The Cerrado Group. This 501(c)(6) Trade Association was established to offer an entirely new approach to the highly-specialized work of retirement plan design, reporting, compliance, and administration. The Cerrado Group members, while remaining independent regional operators, will actively combine their vast resources and service offering to fully service a wide variety of clients. The Cerrado Group is led by highly respected industry veteran, Ann Slotwinski, formerly head of TPA Services at John Hancock, a past NIPA board member and president. She will serve as the Executive Director of the group and the main point of contact.

Founding member firms include:

Abacus Benefit Consultants, Cranston, RI

Acuff & Associates, Brentwood, TN

Alliance Benefit Group of Houston, Houston, TX

Benefit Plans Plus, St. Louis, MO

CrossPlans, Laguna Hills, CA

Pension Plan Specialists, Vancouver, WA

Qualified Pension Services, Littleton, CO

Sunwest Pensions, Tempe, AZ

The Benefit Advantage, Auburn Hills, MI

Named after one of the most biodiverse areas on the planet, Brazil’s massive Cerrado savannah, the collective strength of the by-invitation-only member group is unmatched in the industry today. Their behind-the-scenes work on retirement plans isn’t flashy, but it’s an important component to propel the best businesses forward. The group’s joined force is equivalent to over a century of experience, with plans in all 50 states representing billions of dollars in retirement savings.

Commenting on the announcement, founding member of the collective Joe Burt of Pension Plan Specialists said, “We’re uniquely positioned to serve our customer base, which includes financial advisors and broker dealers, business owners, plan sponsors, and even the participants themselves.” Pat Shelton of Benefit Plans Plus also a founding member stated, “We can effectively solve problems before they exist, counsel around best practices, and ensure the highest order of outcomes for all involved.”

Built with positive independence at their core, The Cerrado Group will immediately commence group activities that include weekly knowledge exchanges called “Confluence,” high-level discussions with recordkeepers, broker-dealers, and advisor partners, and thought leadership work throughout the industry at large.

“TPAs are as close to truly agnostic as any partner within the retirement ecosystem. We’re thrilled our uncommon diversity can come together to deeply impact people. We know our cause is noble, and we’re proud The Cerrado Group is naturally different than other groups in the marketplace today,” said founding member Theresa Conti, of Sunwest Pensions in Tempe, AZ.

Dedicated to amplifying positivity in every community around the globe, The Cerrado Group is starting with a \$10,000 contribution to the World Wildlife Fund, an organization focused on conservation efforts of Brazil’s Cerrado savannah.

Website
www.CerradoGroup.org

For more information, contact:
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