



## SUSAN LOZANOV, ERPA, CPC

Consultant, Defined Contribution

### Areas of Expertise

Defined Contribution  
ESOP  
Plan Compliance  
Recordkeeping  
Plan Administration  
Plan Design

Susan has been providing administration and consulting on defined contribution plans at BPS&M since 1998. Susan currently specializes in advanced compliance testing for her clients and provides consulting and administration for ESOPs. She is an Enrolled Retirement Plan Agent.

### Education

Vanderbilt University, Nashville, TN — B.A., Economics and Spanish

### Publications and Presentations

- *Defining and Using Compensation in Defined Contribution Plans, Developments*, 2015
- *Could Your DC Plan Benefit from Automatic Features*, Developments, 2014
- *Keeping your 401(k) Plan on Track*, webinar, 2013
- *Managing Your DC Plan Through Turbulent Financial Times*, Developments, 2009

### Professional and Community Involvement

- American Society of Pension Professionals & Actuaries (ASPPA)

### Contact Me

[susan.lozanov@bpsm.com](mailto:susan.lozanov@bpsm.com)

5301 Virginia Way  
Suite 400  
Brentwood, TN 37027  
Phone: 615.665.5406

