



BRIAN OBERLANDER, CEBS, QPA, ERPA

Managing Consultant, Defined Contribution

Areas of Expertise

Defined Contribution
Plan Compliance
Data Management
Operational Audits
Plan Corrections
Plan Design
Recordkeeping
Plan Administration

Brian has been helping clients with the administration and design of defined contribution plans since 1989. His areas of special interest include compliance testing, consulting on plan operations, and assisting clients with plan corrections. He has attained the Certified Employee Benefits Specialist (CEBS) designation and is recognized as a Qualified Plan Administrator (QPA) by the American Society of Pension Professionals & Actuaries. He has also earned the Enrolled Retirement Plan Agent (ERPA) designation from the IRS.

Education

Emory University, Atlanta, GA — M.B.A.
University of Notre Dame, South Bend, IN — B.B.A., Finance

Publications and Presentations

- *Dear Sir or Madam: Are You Ready for an IRS Audit*, Developments, 2013
- *DC Plans" Self-Audit Advantages*, Developments, 2009

Professional and Community Involvement

- American Society of Pension Professionals and Actuaries (ASPPA)
- International Society of Certified Employee Benefits Specialists (CEBS)

Contact Me

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