



## CHAD BEATY

Senior Consultant

### Areas of Expertise

Defined Contribution Plan  
Recordkeeping and  
Administration Operations

Defined Contribution Plan  
Design and Implementation

Non-qualified Deferred  
Compensation Plan  
Administration

Plan Conversions

Interactive Phone and Web  
System

Chad Beaty is a Senior Consultant and Operations Manager in the Defined Contribution Recordkeeping and Administration Practice. Chad joined the firm in 1995 as a Senior Administrator and gained extensive experience in retirement plan administration, conversions, and system operations.

In his current position, Chad is responsible for managing all Operations including the recordkeeping system, participant website, voice system and all conversion activities. Chad is responsible for managing all plan conversions onto the recordkeeping software platform, managing client plan design changes and knowing how those plan design changes impact daily operations.

Chad oversees the annual SOC1 audit of the Defined Contribution Recordkeeping and Administration Practice. This audit is conducted by a local CPA firm, and results in a report on controls placed in operation. The report is distributed to clients each year and reports the operational effectiveness of the Practice.

### Education

Bowling Green State University, Bowling Green, Ohio — B.S., Accounting

### What's Your Passion?

In my down time, you may find me on the slopes of a Northern Michigan ski resort or on the beaches of the Caribbean. I also enjoy boating, golfing and watching Ohio State athletics and auto racing.

### Professional and Community Involvement

- Junior Achievement Bowl-A-Thon
- Leadership Toledo, 2010
- Marathon Classic LPGA

### Contact Me

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*Smart solutions  
for a changing workforce*