



CATHY HARRIS

Consultant

Areas of Expertise

Compliance

Compliance Testing

Form 5500 Filing

Defined Contribution Plan
Design & Implementation

Daily Plan Operations

Client Reports &
Communications

Client Relationship
Management

Cathy is a Consultant in the Defined Contribution Recordkeeping and Administration Practice. Prior to joining Findley Davies in 2007, she gained experience in banking, investment and insurance sales at a global financial services firm. Since she has been with the firm, she has added to her knowledge of daily recordkeeping of retirement plans and gained extensive hands-on experience in compliance testing and Form 5500 Filings.

Cathy works with companies to provide the most effective retirement plan benefits to their employees. She works directly with employers to ensure quality and accuracy and maintain service standards. Cathy monitors and reviews the work of Administrators to ensure timely execution and works directly with employees to educate them about retirement benefits. She also addresses discrepancies and system troubleshooting, and produces valuations, statements, and employer reports.

Education

The Ohio State University, Columbus, Ohio — A.A.

What's Your Passion?

I enjoy spending quality time with my family.

Professional and Community Involvement

- Junior Achievement
- Parent Volunteer – Maumee Little League
- ASPPA

Contact Me

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