



KATHY SOPER

Principal

Areas of Expertise

Retirement Consulting

Plan Compliance

Defined Contribution Plan
Design & Implementation

Defined Contribution Plan
Administration

Retirement Plan Reviews and
Fiduciary Assessments

Vendor Searches

Operational Compliance Audits

Provider Strategy and Selection
Management

Kathy Soper is a Principal and Findley Davies' leader for Retirement Plan Consulting. Kathy joined the firm in 1993 and her career has focused on retirement plan consulting where she has significant expertise providing solutions for defined contribution, defined benefit, and deferred compensation retirement plans. She began leading the practice in 2009.

Kathy works with clients to design and administer plans that provide meaningful retirement benefits to their employees. She assists clients with technical issues for plan design, implementation, and compliance for both qualified and non-qualified retirement plans. In addition, Kathy manages projects involving the analysis of plan benefits, operational compliance audits, and helps organizations select high-quality providers to oversee and maintain their retirement plans.

Education

The University of Toledo, Toledo, Ohio — B.B.A., Accounting
Magna Cum Laude

What's Your Passion?

I enjoy watching my children excel in their many athletic events. Go Pirates!

Professional and Community Involvement

- Charles Schwab, Schwab Retirement Technologies Advisory Board, 2013 to present

Contact Me

ksoper@findleydavies.com

One SeaGate
Suite 2050
Toledo, Ohio 43604
Phone: 419.327.4106
Connect on [LinkedIn](#)



*Smart solutions
for a changing workforce*