“What a great presentation on TPA Best Practices. It certainly captured some of the struggles we have gone through melding Boomers with the X and Y generations. Thanks for all the insights.”

– Texas TPA firm manager

SCS Technical Education and Professional Development

At SCS we have a passion for the retirement services industry and we love to teach! We do not believe in “one size fits all” education. We tailor the content and customize the messaging of our programs so that the information is relevant and meaningful to each individual audience. We believe in the value of life-long learning, so we design all of our training programs to conform with ASPPA’s Continuing Professional Education (CPE) requirements. We offer:

Specialized 401(k) and 403(b) Training Programs

- **401 (k) and 403(b) Basic Training**
  Introduction to retirement plan fundamentals and/or refresher to prepare for ASPPA’s credentialing exams designed for processors, administrators, and advisors.

- **401 (k) and 403(b) Intensive Review Sessions and Bootcamps**
  Intensive interactive learning sessions geared toward ASPPA’s certificate and credentialing exams designed for processors, administrators, consultants, and advisors. (RPF-1, RPF-2, DC-1, DC-2, DC-3, PFC-1, TGPC-1)

- **401 (k) and 403(b) Case Study Training**
  Customized interactive training combining technical concepts with real world applications designed for client-facing relationship managers, account managers, and consultants.

- **401 (k) and 403(b) Topical Training**
  General training focused on commonly requested topics or customer-specified topics. Can be designed for processors, administrators, consultants, and advisors and custom-tailored for the experience level of each specific audience.

General Industry Training Sessions

- **Unraveling the Mystery of Plan Compliance**
  Designed for all employees who need to gain a deeper understanding of compliance testing and related issues.

- **Evolution of Qualified Plans**
  A history lesson and political insight into pre-ERISA, ERISA, and post-ERISA times to gain perspective on why we have the rules we do, who the industry players are, and what the future might hold. Designed for all employees in the retirement services industry, but especially helpful for those with 10 years or less experience.

- **TPA and Recordkeeper Best Practices**
  Features real-life examples of best practices for successful TPAs and Recordkeepers and offers insight into the criteria used for ASPPA’s Service Provider Certification program. Designed to familiarize owners, managers, and employees with industry best practices.

- **Industry Updates**
  Overview of timely topics and political happenings designed for all employees working in the retirement services industry.

Professional Development

- **Management and Leadership Training for Retirement Services Professionals**
  Management and leadership techniques and skill building, including bridging generation gaps. Designed for current managers and leaders or for employees who show management and leadership potential. Can be customized to address specific issues.

- **Customer Service and Communication Training for Retirement Services Professionals**
  Customer service and communication techniques and skill building appropriate for all positions and experience levels. Can be customized to address specific issues.

Webcasts, Workshops, and Customized Training Programs

SCS offers a variety of webcasts, workshops, and training programs that can be customized to meet the customer’s needs.

Personnel Assessments

SCS offers personnel assessments and analysis, with recommendations for customized case study or topical training to bridge knowledge gaps.

**Industry Expertise**
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**Real World Experience**