



## Charles E. Balch, QKA *Manager*

Chuck has more than 30 years of experience in qualified retirement plans including plan design, plan documents, compliance, sales, marketing, and administration.

Chuck joined the firm in 1998 as a Manager in the Retirement Plan Services Department. His responsibilities include assisting with the management of the department, sales, plan design including plan documents, administration, and training department staff.

### CERTIFICATIONS

- ▶ Qualified 401(k) Administrator

### PROFESSIONAL AFFILIATIONS

- ▶ American Society of Pension Professionals and Actuaries

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