ADV Part 2B

Brochure Supplement

Schneider Downs Wealth Management Advisors, LP
One PPG Place, Suite 1700
Pittsburgh, PA 15222
412-697-5200

Email: sdwealthmanagement@schneiderdowns.com
Website: www.sdwealthmanagement.com

Individuals Included in Supplement:

Derek J. Eichelberger, CEO, Shareholder
Jason R. Staley, CIO, Shareholder
Michael A. Divens, CCO, COO

E. Matthew Biggs
Tyler J. Barnes
Tyler R. Brose
Alissa M. Garcia
Miles B. Gibson
Demetrius A. Kokales
Patrick E. Kovach
Megan E. Muller

David C. Brinkman, Partner
Michael J. Bucci, Partner
Gregg Daily, Partner
James R. Moyer, Partner

Kelly M. Murphy
Daniel B. Napierkowski
Montana J. Nietert
Kaylin M. Olster
Alexander J. Papson
Michael R. Prosuk
Kyle R. Zeller

Effective Date: July 30, 2026

The enclosed brochure supplement has not been approved by the U.S. Securities & Exchange Commission (SEC) or any state securities authority. This part of the Form ADV provides information about the advisory personnel on whom the client receiving the brochure relies for investment advice. The brochure supplements are to be considered along with the ADV Part 2A. If you have not received a copy of the ADV Part 2A or if you have any questions about the contents of this supplement, please contact Schneider Downs Wealth Management Advisors, LP ("SDWMA") at the phone number or email address listed above.

Additional information about individuals listed in this brochure supplement is available on the SEC's website at www.adviserinfo.sec.gov.

Derek J. Eichelberger

412-697-5672

Schneider Downs Wealth Management Advisors, LP
One PPG Place, Suite 1700
Pittsburgh, PA 15222
412-697-5200

Item 2: Educational Background and Business Experience

Derek J. Eichelberger
Born, 1973

Education:

Pennsylvania State University, B.S.
University of Pittsburgh, Katz Graduate School of Business, M.B.A.

Professional Designations *:

Chartered Financial Analyst®
Certified Financial Planner™

Employment / Business Background for at least 5 previous years:

Schneider Downs Wealth Management Advisors, LP
- CEO, 10/2023 - Present
- Managing Director/Partner, 7/2021 – 9/2023 (Partner since 7/2018)
- Senior Wealth Manager 10/2023 – Present
- Director of Investment Strategies 6/2015 – 6/2021
- Investment Advisor, 6/2015 – 10/2023
- Operations Manager, 3/2015 – 6/2015

Schneider Downs & Co., Inc.
- Shareholder, 7/2022 – Present
- Board of Directors, 7/2025 - Present

Gibson Capital, LLC
- Senior Advisor / Partner, 12/2013 – 8/2014
- Senior Associate, 11/2008 - 09/2013
- Associate, 3/2003 – 3/2009

Item 3: Disciplinary Information - There is no disciplinary information to report.

Item 4: Other Business Activities - There are no other business activities to report.

Item 5: Additional Compensation - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

Item 6: Supervision - SDWMA supervised individuals have a duty of loyalty, to always act in utmost good faith and to place the client's interest first. SDWMA has set in place Policies and Procedures for the firm, compliance with these are a requirement and a high priority for the firm. SDWMA has also established an Investment Committee which sets the investment policy and guidelines for Investment Advisors. It also approves investment products and strategies for use in client accounts. SDMWA uses these policies and guidelines to monitor supervised individuals.

Supervisory responsibilities are held by:
SDCo's Board of Directors
412-697-5200

* Please refer to the last pages of this brochure supplement for further information, including the minimum requirements required, for the professional designation(s) listed above.

Jason R. Staley

412-697-5280

Schneider Downs Wealth Management Advisors, LP
One PPG Place, Suite 1700
Pittsburgh, PA 15222
412-697-5200

Item 2: Educational Background and Business Experience

Jason R. Staley
Born, 1982

Education:

Mercyhurst University, B.A.

Professional Designations *:

Chartered Financial Analyst®
Chartered Alternative Investment Analyst

Employment / Business Background for at least 5 previous years:

Schneider Downs Wealth Management Advisors, LP
- Chief Investment Officer (PFS) 7/2021 - Present
- Senior Wealth Manager 10/2023 – Present
- Partner, 7/2021 – 6/2025
- Director of Research and Due Diligence, 8/2016 – 9/2022
- Investment Relationship Manager 8/2016 – 9/2023

Schneider Downs & Co., Inc.
- Shareholder, 7/2025 – Present
- Board of Directors, 7/2026 - Present

Graystone Consulting / Morgan Stanley
- Institutional Consulting Associate, 3/2016 – 8/2016

Credit Suisse Securities LLC
- Assistant Vice President, 9/2008 – 3/2016

Item 3: Disciplinary Information - There is no disciplinary information to report.

Item 4: Other Business Activities - There are no other business activities to report.

Item 5: Additional Compensation - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

Item 6: Supervision - SDWMA supervised individuals have a duty of loyalty, to always act in utmost good faith and to place the client's interest first. SDWMA has set in place Policies and Procedures for the firm, compliance with these are a requirement and a high priority for the firm. SDWMA has also established an Investment Committee which sets the investment policy and guidelines for Investment Advisors. It also approves investment products and strategies for use in client accounts. SDMWA uses these policies and guidelines to monitor supervised individuals.

Supervisory responsibilities are held by:
Derek Eichelberger, Chief Executive Officer
412-697-5672

* Please refer to the last pages of this brochure supplement for further information, including the minimum requirements required, for the professional designation(s) listed above.

Michael A. Divens

412-697-5032

Schneider Downs Wealth Management Advisors, LP
One PPG Place, Suite 1700
Pittsburgh, PA 15222
412-697-5200

Item 2: Educational Background and Business Experience

Michael A. Divens
Born, 1983

Education:

Carnegie Mellon University. B. S.
University of Pittsburgh, Katz Graduate School of Business, M.B.A.

Professional Designations *:

Chartered Financial Analyst®

Employment / Business Background for at least 5 previous years:

Schneider Downs Wealth Management Advisors, LP
Clief Compliance Officer, 1/2025 - Present
Chief Operating Officer, 8/2024 – Present
Manager of Research and Due Diligence, 9/2022 – 7/2024
Hapanowicz & Associates
Chief Operating Officer, 1/2021 – 8/2022
LPL Financial
Registered Representative, 2/2021 – 8/2022
Private Wealth Advisors, Inc.
Chief Investment Officer/Chief Operation Officer, 1/2019 – 1/2021
Investment Analyst/Operations Manager, 12/2015 – 12/2018

Item 3: Disciplinary Information - There is no disciplinary information to report.

Item 4: Other Business Activities - There are no other business activities to report.

Item 5: Additional Compensation - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

Item 6: Supervision - SDWMA supervised individuals have a duty of loyalty, to always act in utmost good faith and to place the client's interest first. SDWMA has set in place Policies and Procedures for the firm, compliance with these are a requirement and a high priority for the firm. SDWMA has also established an Investment Committee which sets the investment policy and guidelines for Investment Advisors. It also approves investment products and strategies for use in client accounts. SDMWA uses these policies and guidelines to monitor supervised individuals.

Supervisory responsibilities are held by:
Derek Eichelberger, Chief Executive Officer
412-697-5672

* Please refer to the last pages of this brochure supplement for further information, including the minimum requirements required, for the professional designation(s) listed above.

David C. Brinkman

614-586-7265

Schneider Downs Wealth Management Advisors, LP
65 East State Street, Suite 2000
Columbus, OH 43215
614-621-4060

Item 2: Educational Background and Business Experience

David C. Brinkman
Born, 1982

Education:

The Ohio State University, B.A.

Professional Designations *:

Certified Public Accountant
Chartered Financial Analyst®
Certified Financial Planner™

Employment / Business Background for at least 5 previous years:

Schneider Downs Wealth Management Advisors, LP
Partner, 7/2021 – Present
Senior Wealth Manager 10/2023 – Present
Investment Relationship Manager, 5/2016 – 9/2023
Plante Moran Financial Advisors
Manager / Investment Advisor, 12/2014 – 3/2016
Investment Advisor, 8/2012 – 12/2014
William Blair & Company
Research Associate, 11/2011 – 5/2012

Item 3: Disciplinary Information - There is no disciplinary information to report.

Item 4: Other Business Activities - There are no other business activities to report.

Item 5: Additional Compensation - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

Item 6: Supervision - SDWMA supervised individuals have a duty of loyalty, to always act in utmost good faith and to place the client's interest first. SDWMA has set in place Policies and Procedures for the firm, compliance with these are a requirement and a high priority for the firm. SDWMA has also established an Investment Committee which sets the investment policy and guidelines for Investment Advisors. It also approves investment products and strategies for use in client accounts. SDMWA uses these policies and guidelines to monitor supervised individuals.

Supervisory responsibilities are held by:
Derek Eichelberger, Chief Executive Officer
412-697-5672

* Please refer to the last pages of this brochure supplement for further information, including the minimum requirements required, for the professional designation(s) listed above.

Michael J. Bucci

412-697-5329

Schneider Downs Wealth Management Advisors, LP
One PPG Place, Suite 1700
Pittsburgh, PA 15222
412-697-5200

Item 2: Educational Background and Business Experience

Michael J. Bucci
Born, 1981

Education:

East Carolina University, B.S. / B.A.

Professional Designations *:

Certified Investment Management Analyst®

Employment / Business Background for at least 5 previous years:

Schneider Downs Wealth Management Advisors, LP
Partner, 7/2022 – Present
Director of Fiduciary Services, 7/2019 – Present
Investment Advisor, 9/2009 – 6/2019

Item 3: Disciplinary Information - There is no disciplinary information to report.

Item 4: Other Business Activities - There are no other business activities to report.

Item 5: Additional Compensation - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

Item 6: Supervision - SDWMA supervised individuals have a duty of loyalty, to always act in utmost good faith and to place the client's interest first. SDWMA has set in place Policies and Procedures for the firm, compliance with these are a requirement and a high priority for the firm. SDWMA has also established an Investment Committee which sets the investment policy and guidelines for Investment Advisors. It also approves investment products and strategies for use in client accounts. SDMWA uses these policies and guidelines to monitor supervised individuals.

Supervisory responsibilities are held by:
Derek Eichelberger, Chief Executive Officer
412-697-5672

* Please refer to the last pages of this brochure supplement for further information, including the minimum requirements required, for the professional designation(s) listed above.

Gregg W. Daily

412-697-5682

Schneider Downs Wealth Management Advisors, LP
One PPG Place, Suite 1700
Pittsburgh, PA 15222
412-697-5200

Item 2: Educational Background and Business Experience

Gregg W. Daily
Born, 1972

Education:
Sanford Brown, AA

Professional Designations *:

Employment / Business Background for at least 5 previous years:
Schneider Downs Wealth Management Advisors, LP
Partner, 07/2025 – Present
Sr. Wealth Manager, 10/2023 - Present
Investment Relationship Manager, 11/2021 – 9/2023
PNC Bank NA
Institutional Trust Office, 01/2020 – 11/2021
Fragasso Financial Advisors
Financial Advisor, 03/2002 – 08/2019

Item 3: Disciplinary Information - There is no disciplinary information to report.

Item 4: Other Business Activities - There are no other business activities to report.

Item 5: Additional Compensation - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

Item 6: Supervision - SDWMA supervised individuals have a duty of loyalty, to always act in utmost good faith and to place the client's interest first. SDWMA has set in place Policies and Procedures for the firm, compliance with these are a requirement and a high priority for the firm. SDWMA has also established an Investment Committee which sets the investment policy and guidelines for Investment Advisors. It also approves investment products and strategies for use in client accounts. SDMWA uses these policies and guidelines to monitor supervised individuals.

Supervisory responsibilities are held by:
Derek Eichelberger, Chief Executive Officer
412-697-5672

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James R. Moyer

412-697-5643

Schneider Downs Wealth Management Advisors, LP
One PPG Place, Suite 1700
Pittsburgh, PA 15222
412-697-5200

Item 2: Educational Background and Business Experience

James R. Moyer
Born, 1989

Education:

Slippery Rock University, M.B.A.
Slippery Rock University, B.S.B.A.
Duquesne University – Executive Certificate in Financial Planning
Pittsburgh Technical College – Associates Degree

Professional Designations *:

Certified Financial Planner™

Employment / Business Background for at least 5 previous years:

Schneider Downs Wealth Management Advisors, LP
- Partner, 07/01/2026 - Present
- Sr. Wealth Manager, 07/2025 - Present
- Wealth Manager, 10/2023 -06/2025
- Investment Relationship Manager, 1/2020 – 9/2023
- Associate Investment Advisor – 1/2018 - 12/2019

PNC Wealth Management
- Investment Advisor, 2/2017 – 1/2018
- Analyst, 2/2016 – 2/2017

PNC Bank N.A.
- Personal Banker, 5/2014 – 2/2016

U.S. Air Force – Air National Guard
- Staff Sergeant, 7/2009 – 7/2016

Item 3: Disciplinary Information - There is no disciplinary information to report.

Item 4: Other Business Activities - There are no other business activities to report.

Item 5: Additional Compensation - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

Item 6: Supervision - SDWMA supervised individuals have a duty of loyalty, to always act in utmost good faith and to place the client's interest first. SDWMA has set in place Policies and Procedures for the firm, compliance with these are a requirement and a high priority for the firm. SDWMA has also established an Investment Committee which sets the investment policy and guidelines for Investment Advisors. It also approves investment products and strategies for use in client accounts. SDMWA uses these policies and guidelines to monitor supervised individuals.

Supervisory responsibilities are held by:
Gregg Daily, Partner
412-697-5682

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* Please refer to the last pages of this brochure supplement for further information, including the minimum requirements required, for the professional designation(s) listed above.

E. Matthew Biggs

614-586-7123

Schneider Downs Wealth Management Advisors, LP
65 East State Street, Suite 2000
Columbus, OH 43215
614-621-4060

Item 2: Educational Background and Business Experience

E. Matthew Biggs
Born, 1991

Education:

The Ohio State University, B.A.

Professional Designations *:

Certified Financial Planner™
Chartered Alternative Investment Analyst

Employment / Business Background for at least 5 previous years:

Schneider Downs Wealth Management Advisors, LP
- Sr. Wealth Manager, 07/2025 - Present
- Wealth Manager, 10/2023 – 06/2025
- Investment Relationship Manager, 7/2022 – 9/2023
- Investment Advisor, 7/2021 – 6/2022
- Associate Investment Advisor, 10/2018 – 6/2021

Huntington Bank
- Relationship Banker III, 6/2017 – 9/2018

Fidelity Investments
- Investment Consultant, 12/2016 – 6/2017
- Financial Representative, 12/2015 – 12/2016

BlueGrace Logistics
- Account Executive, 7/2015 – 11/2015

Northwestern Mutual
- Financial Representative, 5/2014 – 7/2015

Item 3: Disciplinary Information - There is no disciplinary information to report.

Item 4: Other Business Activities - There are no other business activities to report.

Item 5: Additional Compensation - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

Item 6: Supervision - SDWMA supervised individuals have a duty of loyalty, to always act in utmost good faith and to place the client's interest first. SDWMA has set in place Policies and Procedures for the firm, compliance with these are a requirement and a high priority for the firm. SDWMA has also established an Investment Committee which sets the investment policy and guidelines for Investment Advisors. It also approves investment products and strategies for use in client accounts. SDMWA uses these policies and guidelines to monitor supervised individuals.

Supervisory responsibilities are held by:
Gregg Daily, Partner
412-697-5682

* Please refer to the last pages of this brochure supplement for further information, including the minimum requirements required, for the professional designation(s) listed above.

Tyler J. Barnes

614-586-7032

Schneider Downs Wealth Management Advisors, LP
65 East State Street, Suite 2000
Columbus, OH 43215
614-621-4060

Item 2: Educational Background and Business Experience

Tyler J. Barnes
Born, 2002

Education:

The Ohio State University, B.A.

Professional Designations *:

Employment / Business Background for at least 5 previous years:

Schneider Downs Wealth Management Advisors, LP
Associate Investment Advisor, 9/2025 – Present
ClearCourse Wealth Advisors
Financial Planning Assistant, 5/2024 – 9/2025
Envisage Wealth
Financial Planning Intern, 9/2021 – 5/2024

Item 3: Disciplinary Information - There is no disciplinary information to report.

Item 4: Other Business Activities - There are no other business activities to report.

Item 5: Additional Compensation - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

Item 6: Supervision - SDWMA supervised individuals have a duty of loyalty, to always act in utmost good faith and to place the client's interest first. SDWMA has set in place Policies and Procedures for the firm, compliance with these are a requirement and a high priority for the firm. SDWMA has also established an Investment Committee which sets the investment policy and guidelines for Investment Advisors. It also approves investment products and strategies for use in client accounts. SDMWA uses these policies and guidelines to monitor supervised individuals.

Supervisory responsibilities are held by:
Michael Bucci, Partner
412-697-5329

***** Please refer to the last pages of this brochure supplement for further information, including the minimum requirements required, for the professional designation(s) listed above.

Tyler R. Brose

412-697-5609

Schneider Downs Wealth Management Advisors, LP
One PPG Place, Suite 1700
Pittsburgh, PA 15222
412-697-5200

Item 2: Educational Background and Business Experience

Tyler Brose
Born, 1993

Education:

Pennsylvania State University, Erie, B.S.

Professional Designations *:

Certified Financial Planner™
Certified Plan Fiduciary Adviser®

Employment / Business Background for at least 5 previous years:

Schneider Downs Wealth Management Advisors, LP
- Senior Manager of Fiduciary Services, 7/2024 - Present
- Retirement Plan Manager, 7/2022 – 6/2024
- Senior Retirement Plan Advisor, 7/2021 – 6/2022
- Associate Investment Advisor, 3/2019 –6/2021

Hefren Tillotson
- Analyst, 2/2016 – 1/2019
- Intern, 5/2015 – 12/2015

Item 3: Disciplinary Information - There is no disciplinary information to report.

Item 4: Other Business Activities - There are no other business activities to report.

Item 5: Additional Compensation - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

Item 6: Supervision - SDWMA supervised individuals have a duty of loyalty, to always act in utmost good faith and to place the client's interest first. SDWMA has set in place Policies and Procedures for the firm, compliance with these are a requirement and a high priority for the firm. SDWMA has also established an Investment Committee which sets the investment policy and guidelines for Investment Advisors. It also approves investment products and strategies for use in client accounts. SDMWA uses these policies and guidelines to monitor supervised individuals.

Supervisory responsibilities are held by:
Michael Bucci, Partner
412-697-5329

***** Please refer to the last pages of this brochure supplement for further information, including the minimum requirements required, for the professional designation(s) listed above.

Alissa M. Garcia

412-697-5665

Schneider Downs Wealth Management Advisors, LP
One PPG Place, Suite 1700
Pittsburgh, PA 15222
412-697-5200

Item 2: Educational Background and Business Experience

Alissa M. Garcia
Born, 1988

Education:

University of Pittsburgh, M.P.I.A.
Geneva College, B.S.

Professional Designations *:

Certified Financial Planner™

Employment / Business Background for at least 5 previous years:

Schneider Downs Wealth Management Advisors, LP
- Sr. Wealth Manager, 07/2025 - Present
- Wealth Manager, 10/2023 – 06/2025
- Communications Manager, 10/2019 - Present
- Investment Relationship Manager, 1/2020 – 9/2023
- Associate Investment Advisor, 1/2018 – 12/2019

Oakmont Capital Management, LLC
- Portfolio Manager, 11/2016 – 1/2018

Trustmont Advisory Group, Inc. / Trustmont Financial Group, Inc.
- Investment Advisor, 6/2015 – 10/2016
- Registered Representative, 8/2014 – 10/2016

Item 3: Disciplinary Information - There is no disciplinary information to report.

Item 4: Other Business Activities - There are no other business activities to report.

Item 5: Additional Compensation - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

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Supervisory responsibilities are held by:
Gregg Daily, Partner
412-697-5682

* Please refer to the last pages of this brochure supplement for further information, including the minimum requirements required, for the professional designation(s) listed above.

Miles B. Gibson

412-697-5363

Schneider Downs Wealth Management Advisors, LP
One PPG Place, Suite 1700
Pittsburgh, PA 15222
412-697-5200

Item 2: Educational Background and Business Experience

Miles B. Gibson
Born, 1993

Education:

University of Pittsburgh, B.S.

Professional Designations *:

Certified Financial Planner™
Certified Plan Fiduciary Adviser®

Employment / Business Background for at least 5 previous years:

Schneider Downs Wealth Management Advisors, LP
Retirement Plan Manager, 7/2024 - Present
Associate Retirement Plan Advisor, 10/2021 – 6/2024
United States Marine Corp. Reserves
Intelligence Officer 10/2021 – Present
United States Marine Corp.
Intelligence Officer 1/2019 – 9/2021
SDAdvantage Retirement Solutions, LP
03/2018 – 12/2018
Schneider Downs & Co., Inc.
Intern 09/2017 – 03/2018
Intern 06/2016 – 09/2016

Item 3: Disciplinary Information - There is no disciplinary information to report.

Item 4: Other Business Activities - There are no other business activities to report.

Item 5: Additional Compensation - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

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Supervisory responsibilities are held by:
Michael Bucci, Partner
412-697-5329

* Please refer to the last pages of this brochure supplement for further information, including the minimum requirements required, for the professional designation(s) listed above.

Demetrius A. Kokales

412-697-5869

Schneider Downs Wealth Management Advisors, LP
One PPG Place, Suite 1700
Pittsburgh, PA 15222
412-697-5200

Item 2: Educational Background and Business Experience

Demetrius A. Kokales
Born, 1994

Education:

Duquesne University, B.S.

Professional Designations *:

Certified Financial Planner™

Employment / Business Background for at least 5 previous years:

Schneider Downs Wealth Management Advisors, LP
Wealth Manager, 7/2024 - Present
Wealth Associate, 10/2023 – 6/2024
Associate Investment Advisor, 11/2021 – 9/2023
Greek Orthodox Church
Bookkeeping 11/2021 – 6/2023
Fort Pitt Capital Group, LLC
Planning Specialist 11/2019 – 10/2021
PNC Investments
Internal Licensing Program 5/2019 – 10/2019
Customer Service and Support Representative 12/2016 – 10/2019

Item 3: Disciplinary Information - There is no disciplinary information to report.

Item 4: Other Business Activities - There are no other business activities to report.

Item 5: Additional Compensation - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

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Supervisory responsibilities are held by:
Gregg Daily, Partner
412-697-5682

* Please refer to the last pages of this brochure supplement for further information, including the minimum requirements required, for the professional designation(s) listed above.

Patrick E. Kovach

412-697-5898

Schneider Downs Wealth Management Advisors, LP
One PPG Place, Suite 1700
Pittsburgh, PA 15222
412-697-5200

Item 2: Educational Background and Business Experience

Patrick E. Kovach
Born, 2001

Education:

Pennsylvania Western University, B.S.
Texas Tech University, M.S.

Professional Designations *:

Employment / Business Background for at least 5 previous years:

Schneider Downs Wealth Management Advisors, LP
Wealth Associate, 6/2026 – Present
Hapanowicz & Associates
Senior Financial Planner, 10/2025 – 05/2026
Associate Wealth Advisor, 05/2025 – 05/2026

Item 3: Disciplinary Information - There is no disciplinary information to report.

Item 4: Other Business Activities - There are no other business activities to report.

Item 5: Additional Compensation - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

Item 6: Supervision - SDWMA supervised individuals have a duty of loyalty, to always act in utmost good faith and to place the client's interest first. SDWMA has set in place Policies and Procedures for the firm, compliance with these are a requirement and a high priority for the firm. SDWMA has also established an Investment Committee which sets the investment policy and guidelines for Investment Advisors. It also approves investment products and strategies for use in client accounts. SDMWA uses these policies and guidelines to monitor supervised individuals.

Supervisory responsibilities are held by:
Gregg Daily, Partner
412-697-5682

* Please refer to the last pages of this brochure supplement for further information, including the minimum requirements required, for the professional designation(s) listed above.

Megan E. Muller

412-697-5726

Schneider Downs Wealth Management Advisors, LP
One PPG Place, Suite 1700
Pittsburgh, PA 15222
412-697-5200

Item 2: Educational Background and Business Experience

Megan E. Muller
Born, 2001

Education:

Robert Morris University, M.B.A
Robert Morris University, B.S.

Professional Designations *:

Certified Financial Planner™

Employment / Business Background for at least 5 previous years:

Schneider Downs Wealth Management Advisors, LP
Wealth Manager, 7/2026 - Present
Wealth Associate, 7/2024 – 6/2026
Wealth Analyst, 8/2022 – 6/2024
Three Cord True Wealth Management
Non-Licensed Agent, 09/2021 – 08/2022
Blue Sky Closing Services
Intern, 06/2021 – 09/2021
H2R CPA.
Tax Intern, 02/2021 - 05/2021

Item 3: Disciplinary Information - There is no disciplinary information to report.

Item 4: Other Business Activities - There are no other business activities to report.

Item 5: Additional Compensation - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

Item 6: Supervision - SDWMA supervised individuals have a duty of loyalty, to always act in utmost good faith and to place the client's interest first. SDWMA has set in place Policies and Procedures for the firm, compliance with these are a requirement and a high priority for the firm. SDWMA has also established an Investment Committee which sets the investment policy and guidelines for Investment Advisors. It also approves investment products and strategies for use in client accounts. SDMWA uses these policies and guidelines to monitor supervised individuals.

Supervisory responsibilities are held by:
Gregg Daily, Partner
412-697-5682

* Please refer to page 17-18 of this brochure supplement for further information, including the minimum requirements required, for the professional designation(s) listed above.

Kelly M. Murphy

614-586-7118

Schneider Downs Wealth Management Advisors, LP
65 East State Street, Suite 2000
Columbus, OH 43215
614-621-4060

Item 2: Educational Background and Business Experience

Kelly M. Murphy
Born, 1977

Education:

Franklin University, B.S.
University of Cincinnati – Associates Degree

Professional Designations *:

Certified Financial Planner™
Financial Paraplanner Qualified Professional℠

Employment / Business Background for at least 5 previous years:

Schneider Downs Wealth Management Advisors, LP
- Wealth Manager, 4/2025 - Present
- Retirement Plan Manager, 7/2024 – 4/2025
- Retirement Plan Advisor, 7/2021 – 6/2024
- Associate Investment Advisor, 3/2020 – 6/2021
- Wealth Management Associate, 11/2019 – 3/2020

Everhart Advisors
- Relationship Manager, 6/2019-11-2019

Cassady Schiller Wealth Management, LLC
- Client Service Administrator, 2/2005 – 6/2019

Item 3: Disciplinary Information - There is no disciplinary information to report.

Item 4: Other Business Activities - There are no other business activities to report.

Item 5: Additional Compensation - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

Item 6: Supervision - SDWMA supervised individuals have a duty of loyalty, to always act in utmost good faith and to place the client's interest first. SDWMA has set in place Policies and Procedures for the firm, compliance with these are a requirement and a high priority for the firm. SDWMA has also established an Investment Committee which sets the investment policy and guidelines for Investment Advisors. It also approves investment products and strategies for use in client accounts. SDMWA uses these policies and guidelines to monitor supervised individuals.

Supervisory responsibilities are held by:
Gregg Daily, Partner
412-697-5682

* Please refer to page 17-18 of this brochure supplement for further information, including the minimum requirements required, for the professional designation(s) listed above.

Daniel B. Napierkowski

412-697-5428

Schneider Downs Wealth Management Advisors, LP
One PPG Place, Suite 1700
Pittsburgh, PA 15222
412-697-5200

Item 2: Educational Background and Business Experience

Daniel B. Napierkowski
Born, 1974

Education:

Indiana University of Pennsylvania, B.A.

Professional Designations *:

Certified Financial Planner™
Accredited Asset Management Specialist℠

Employment / Business Background for at least 5 previous years:

Schneider Downs Wealth Management Advisors, LP
- Senior Manager of Fiduciary Services, 7/2022 – Present
- Senior Relationship Manager, 6/2017 – 6/2022
- Relationship Manager, 4/2005 – 6/2017
- Service Representative 2/2001 – 4/2005

Item 3: Disciplinary Information - There is no disciplinary information to report.

Item 4: Other Business Activities - There are no other business activities to report.

Item 5: Additional Compensation - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

Item 6: Supervision - SDWMA supervised individuals have a duty of loyalty, to always act in utmost good faith and to place the client's interest first. SDWMA has set in place Policies and Procedures for the firm, compliance with these are a requirement and a high priority for the firm. SDWMA has also established an Investment Committee which sets the investment policy and guidelines for Investment Advisors. It also approves investment products and strategies for use in client accounts. SDMWA uses these policies and guidelines to monitor supervised individuals.

Supervisory responsibilities are held by:
Michael Bucci, Partner
412-697-5329

* Please refer to the last pages of this brochure supplement for further information, including the minimum requirements required, for the professional designation(s) listed above.

Montana J. Nietert

412-697-5765

Schneider Downs Wealth Management Advisors, LP
One PPG Place, Suite 1700
Pittsburgh, PA 15222
412-697-5200

Item 2: Educational Background and Business Experience

Montana J. Nietert
Born, 2000

Education:

Gannon University, M.B.A.
Gannon University, B.A.

Professional Designations *:

Employment / Business Background for at least 5 previous years:

Schneider Downs Wealth Management Advisors, LP
Associate Retirement Plan Advisor, 7/2025 – Present
LPL Enterprise, LLC,
Mass Transfer, 11/2024 – 06/2025
The Prudential Insurance Company of America
Financial Professional, 9/2024 – 06/2025
Pruco Securities
Registered Representative, 2/2024 – 11/2024

Item 3: Disciplinary Information - There is no disciplinary information to report.

Item 4: Other Business Activities - There are no other business activities to report.

Item 5: Additional Compensation - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

Item 6: Supervision - SDWMA supervised individuals have a duty of loyalty, to always act in utmost good faith and to place the client's interest first. SDWMA has set in place Policies and Procedures for the firm, compliance with these are a requirement and a high priority for the firm. SDWMA has also established an Investment Committee which sets the investment policy and guidelines for Investment Advisors. It also approves investment products and strategies for use in client accounts. SDMWA uses these policies and guidelines to monitor supervised individuals.

Supervisory responsibilities are held by:
Michael Bucci, Partner
412-697-5329

* Please refer to the last pages of this brochure supplement for further information, including the minimum requirements required, for the professional designation(s) listed above.

Kaylin M. Olster

412-697-5445

Schneider Downs Wealth Management Advisors, LP
One PPG Place, Suite 1700
Pittsburgh, PA 15222
412-697-5200

Item 2: Educational Background and Business Experience

Kaylin M. Olster
Born, 2001

Education:

Temple University, B.B.A.

Professional Designations *:

Employment / Business Background for at least 5 previous years:

Schneider Downs Wealth Management Advisors, LP
- Wealth Associate, 7/2026 – Present
- Wealth Analyst, 12/2024 – 6/2026

Corient
- Financial Planning Intern, 01/2024 – 04/2024, 6/2023 – 8/2023

Odyssey Capital Advisors
- Financial Planning & Investment Analysis Intern, 06/2022 – 12/2022

Item 3: Disciplinary Information - There is no disciplinary information to report.

Item 4: Other Business Activities - There are no other business activities to report.

Item 5: Additional Compensation - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

Item 6: Supervision - SDWMA supervised individuals have a duty of loyalty, to always act in utmost good faith and to place the client's interest first. SDWMA has set in place Policies and Procedures for the firm, compliance with these are a requirement and a high priority for the firm. SDWMA has also established an Investment Committee which sets the investment policy and guidelines for Investment Advisors. It also approves investment products and strategies for use in client accounts. SDMWA uses these policies and guidelines to monitor supervised individuals.

Supervisory responsibilities are held by:
Gregg Daily, Partner
412-697-5682

* Please refer to the last pages of this brochure supplement for further information, including the minimum requirements required, for the professional designation(s) listed above.

Alexander J. Papson

412-697-5488

Schneider Downs Wealth Management Advisors, LP
One PPG Place, Suite 1700
Pittsburgh, PA 15222
412-697-5200

Item 2: Educational Background and Business Experience

Alexander J. Papson
Born, 1992

Education:

Duquesne University, M.B.A.
Gannon University, B.S.

Professional Designations *:

Certified Financial Planner™
Certified Health Savings Adviser
Certified Plan Fiduciary Adviser

Employment / Business Background for at least 5 previous years:

Schneider Downs Wealth Management Advisors, LP
- Senior Manager of Fiduciary Solutions, 7/2022 – Present
- Manager of Fiduciary Solutions, 4/2019 – 6/2022

D.B. Root & Company, LLC / R. Applegate & Associates, LLC
- Associate Director, 1/2018 – 3/2019

Purshe Kaplan Sterling Investments
- Registered Representative 1/2018-3/2019

Cantor Fitzgerald Wealth Partners, LLC
- Relationship Manager, 3/2017 – 12/2017
- Client Associate, 1/2016 – 2/2017
- Client Administrator, 6/2015 – 12/2015

Item 3: Disciplinary Information - There is no disciplinary information to report.

Item 4: Other Business Activities - There are no other business activities to report.

Item 5: Additional Compensation - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

Item 6: Supervision - SDWMA supervised individuals have a duty of loyalty, to always act in utmost good faith and to place the client's interest first. SDWMA has set in place Policies and Procedures for the firm, compliance with these are a requirement and a high priority for the firm. SDWMA has also established an Investment Committee which sets the investment policy and guidelines for Investment Advisors. It also approves investment products and strategies for use in client accounts. SDMWA uses these policies and guidelines to monitor supervised individuals.

Supervisory responsibilities are held by:
Michael Bucci, Partner
412-697-5329

* Please refer to the last pages of this brochure supplement for further information, including the minimum requirements required, for the professional designation(s) listed above.

Michael R. Prosuk

614-586-7134

Schneider Downs Wealth Management Advisors, LP
65 East State Street, Suite 2000
Columbus, OH 43215
614-621-4060

Item 2: Educational Background and Business Experience

Michael R. Prosuk
Born, 1996

Education:

The Ohio State University, B.A.

Professional Designations *:

Employment / Business Background for at least 5 previous years:

Schneider Downs Wealth Management Advisors, LP
Associate Retirement Plan Advisor, 3/2025 – Present
LPL Enterprise, LLC,
Financial Professional, 11/2024 – March 2025
The Prudential Insurance Company of America
Financial Professional, 2/2024 – 3/2025
Pruco Securities
Registered Representative, 8/2023 – 11/2024
PFS Investments, Inc.
Registered Representative, 6/2023 – 8/2023
Upstart
Fraud Specialist, 3/2021 – 6/2023
Nationwide Financial
Internal Sales Rep, 1/2020 – 3/2021

Item 3: Disciplinary Information - There is no disciplinary information to report.

Item 4: Other Business Activities - There are no other business activities to report.

Item 5: Additional Compensation - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

Item 6: Supervision - SDWMA supervised individuals have a duty of loyalty, to always act in utmost good faith and to place the client's interest first. SDWMA has set in place Policies and Procedures for the firm, compliance with these are a requirement and a high priority for the firm. SDWMA has also established an Investment Committee which sets the investment policy and guidelines for Investment Advisors. It also approves investment products and strategies for use in client accounts. SDMWA uses these policies and guidelines to monitor supervised individuals.

Supervisory responsibilities are held by:
Michael Bucci, Partner
412-697-5329

* Please refer to the last pages of this brochure supplement for further information, including the minimum requirements required, for the professional designation(s) listed above.

Kyle R. Zeller

614-586-7263

Schneider Downs Wealth Management Advisors, LP
65 East State Street, Suite 2000
Columbus, OH 43215
614-621-4060

Item 2: Educational Background and Business Experience

Kyle R. Zeller
Born, 1974

Education:

The Ohio State University, B.A.

Professional Designations *:

Certified Plan Fiduciary Adviser®
Accredited Investment Fiduciary®
Qualified 401(k) Administrator
Nonqualified Plan Consultant™

Employment / Business Background for at least 5 previous years:

Schneider Downs Wealth Management Advisors, LP
Director of Fiduciary Services, 7/2026 – Present
Senior Manager of Fiduciary Services, 7/2022 – 6/2026
Senior Relationship Manager 7/2017 – 6/2022
Relationship Manager, 10/2000 – 6/2017

SagePoint Financial, Inc. ******
Registered Representative, 7/2001 – 12/2017

Item 3: Disciplinary Information - There is no disciplinary information to report.

Item 4: Other Business Activities - There are no other business activities to report.

Item 5: Additional Compensation - There are no arrangements where, someone other than the client, gives supervised individual an economic benefit for providing advisory services.

Item 6: Supervision - SDWMA supervised individuals have a duty of loyalty, to always act in utmost good faith and to place the client's interest first. SDWMA has set in place Policies and Procedures for the firm, compliance with these are a requirement and a high priority for the firm. SDWMA has also established an Investment Committee which sets the investment policy and guidelines for Investment Advisors. It also approves investment products and strategies for use in client accounts. SDMWA uses these policies and guidelines to monitor supervised individuals.

Supervisory responsibilities are held by:
Michael Bucci, Partner
412-697-5329

***** Please refer to the last pages of this brochure supplement for further information, including the minimum requirements required, for the professional designation(s) listed above.

****** Formerly AIG Financial Advisors, Inc., which was formerly American General Securities Incorporated.

Professional Designations Disclosures:

Accredited Asset Management Specialist℠ (AAMS®) – The College for Financial Planning® awards the ACCREDITED ASSET MANAGEMENT SPECIALIST℠ and AAMS® designation to students who; successfully complete the program; pass the final examination; and comply with the Code of Ethics, which includes agreeing to abide by the Standards of Professional Conduct and Terms and Conditions.
Students must sign and return the Code of Ethics forms within six months of passing the final exam. Failure to complete and submit the forms within this time frame may result in termination of the individual's candidacy. Continued use of the AAMS® designation is subject to ongoing renewal requirements. Every two years individuals must renew their right to continue using the AAMS® designation by: completing 16 hours of continuing education; reaffirming to abide by the Standards of Professional Conduct, Terms and Conditions, and self-disclose any criminal, civil, self-regulatory organization, or governmental agency inquiry, investigation, or proceeding relating to their professional or business conduct; and paying a biennial renewal fee.

The exam is offered electronically at a testing center. Topics include: The Asset Management Process, Investors, Policy & Change, Risk, Return & Investment Performance, Asset Allocation & Selection, Investment Strategies, Taxation of Investment Products, and Investment Opportunities for an Individual's Retirement, Investment Considerations for Small-Business Owners, and Deferred Compensation & Other Benefit Plans for Key Executives.

Accredited Investment Fiduciary® (AIF®) – The Accredited Investment Fiduciary® (AIF®) professional designation is offered thorough fi360's AIF Training program. AIF designees learn to identify when an individual or organization may be deemed to have fiduciary status, identify the legal standards that require fiduciaries to prudently manage investment decisions, apply the practices that define a prudent process for investment stewards and advisors, and strengthen their policies and procedures. Upon completion of the program, you must pass a 90-minute closed book exam.

Ongoing AIF designees must; accrue six hours of continuing professional education annually, attest to a code of ethics, maintain current contact information in fi360's designee database and remit annual dues

Accredited Investment Fiduciary Analyst® (AIFA®) – The Accredited Investment Fiduciary Analyst™ professional designation is offered through fi360's AIFA Training program. Applicants must have obtained the AIF® credential, complete the AIFA® training program and have a minimum of 8 years of relevant experience within the financial services industry. Upon completion of the specialized program on investment fiduciary standards of care, the designee will have a thorough knowledge of and ability to apply the fiduciary practices. They are qualified to conduct independent fiduciary reviews for nonprofit endowments and foundations, ERISA retirement plans, private family trusts and high net worth individuals.

Ongoing a minimum of 10 hours of Continuing Education must be accrued and reported to retain the credential. In addition, designees must review and update their application and remit payment of dues during their annual renewal cycle.

CERTIFIED FINANCIAL PLANNER™ (CFP®) - The CFP® certification is a voluntary certification; no federal or state law or regulation requires financial planners to hold CFP® certification. It is recognized in the United States and several other countries for its (1) high standard of professional education; (2) stringent code of conduct and standards of practice; and (3) ethical requirements that govern professional engagements with clients.

To attain the right to use the CFP® marks, an individual must satisfactorily fulfill the following requirements:

- Education – Complete an advanced college-level course of study addressing the financial planning subject areas that CFP Board's studies have determined as necessary for the competent and professional delivery of financial planning services and attain a bachelor's degree from a regionally accredited United States college or university (or its equivalent from a foreign university). CFP Board's financial planning subject areas include insurance planning and risk management, employee benefits planning, investment planning, income tax planning, retirement planning, and estate planning
- Examination – Pass the comprehensive CFP® Certification Examination. The examination includes case studies and client scenarios designed to test one's ability to correctly diagnose financial planning issues and apply one's knowledge of financial planning to real world circumstances.
- Experience – Complete at least three years of full-time financial planning-related experience (or the equivalent, measured as 2,000 hours per year); and
- Ethics – Agree to be bound by CFP Board's *Standards of Professional Conduct*, a set of documents outlining the ethical and practice standards for CFP® professionals.

Individuals who become certified must complete the following ongoing education and ethics requirements:

- Continuing Education – Complete 30 hours of continuing education hours every two years, including two hours on the *Code of Ethics* and other parts of the *Standards of Professional Conduct*, to maintain competence and keep up with developments in the financial planning field; and
- Ethics – Renew an agreement to be bound by the *Standards of Professional Conduct.* The *Standards* prominently require that CFP® professionals provide financial planning services at a fiduciary standard of care. This means CFP® professionals must provide financial planning services in the best interests of their clients.

CFP® professionals who fail to comply with the above standards and requirements may be subject to CFP Board's enforcement process, which could result in suspension or permanent revocation of their CFP® certification.

Certified Health Savings Adviser (CHSA®) – The CHSA® is a nationally-recognized training and designation program that is designed to provide financial and employee benefit professionals with the knowledge and support required to take full advantage of the rapidly growing consumer-driven healthcare and HSA marketplaces - for the benefit of their clients as well as their own practices. The CHSA® is more than just the rules and regulations surrounding health savings accounts –though that is covered in the program. The CHSA® is designed to provide context as to how the HSA fits into the bigger puzzle of healthcare financing and retirement planning. As a prerequisite required to obtain the designation, an individual must currently be employed or have two years of work experience in either the financial services or human resources / benefits industry. The certification program consists of four modules from Intro and the Basics to insights on a long-term strategy to utilize HSAs. Candidates must receive a passing score of 70% on the exam. The CHSA® certification signifies that an individual has met initial and on-going experience, ethical, education, and examination requirements for investment

Certified Investment Management Analyst® (CIMA®) – The CIMA certification signifies that an individual has met initial and on-going experience, ethical, education, and examination requirements for investment management consulting, including advanced investment management theory and application. Prerequisites for the CIMA certification are three years of financial services experience and an acceptable regulatory history. To obtain the CIMA certification, candidates must pass a proctored Qualification Examination, successfully complete a one-week classroom education program provided by a Registered Education Provider at an AACSB accredited university business school, pass an online Certification Examination, and have an acceptable regulatory history as evidenced by FINRA Form U-4 or other regulatory requirements. CIMA designees are required to adhere to IWA's *Code of Professional Responsibility*, *Standards of Practice*, and *Rules and Guidelines for Use of the Marks*. CIMA designees must report 40 hours of continuing education credits, including two ethics hours, every two years to maintain the certification. The designation is administered through Investment and Wealth Institute (IWI).

Certified Plan Fiduciary Advisor (CPFA®) – The CPFA credential demonstrates an adviser's knowledge, expertise, and commitment to working with retirement plans. Plan advisers who earn their CPFA demonstrate the expertise required to act as a plan fiduciary or help plan fiduciaries manage their roles and responsibilities. Candidates must pass a qualifying exam that focuses on the following areas: ERISA Fiduciary Roles and Responsibilities, ERISA Fiduciary Oversight, ERISA Plan Investment Management, and ERISA Plan Management. To maintain your CPFA credentials, candidates must earn 20 continuing education credits every two years. Of those 20 credits, 2 must be on ethics / professionalism. The designation is administered through National Association of Plan Advisors (NAPA).

Certified Public Accountant (CPA) – In order to become a CPA in the United States, the candidate must sit for and pass the Uniform Certified Public Accountant Examination, which is set by the American Institute of Certified Public Accountants and administered by the National Association of State Boards of Accountancy. Eligibility to sit for the Uniform CPA Exam is determined by their individual State Boards of Accountancy. While state laws and regulations vary, typically the requirement is a U.S. bachelor's degree which includes a minimum number of qualifying credit hours in accounting and business administration. Most states require at least one year of experience providing services that involve the use of accounting, attest, compilation, management advisory, financial advisory, tax or consulting skills, all of which must be achieved under the supervision of or verification by a CPA. All CPA candidates must pass the Uniform CPA Examination to qualify for a CPA certificate and license to practice public accounting. The CPA examination consists of four sections and is a rigorous, computerized exam.

CPAs are required to take continuing education courses to renew their license. Requirements vary by state. Most states require 120 hours of CPE every 3 years with a minimum of 20 hours per calendar year. As part of the CPE requirement, most states require their CPAs to take an ethics course during every renewal period. Ethics requirements vary by state, and the courses range from 2–8 hours. Additionally, all American Institute of Certified Public Accountants (AICPA) members are required to follow a rigorous *Code of Professional Conduct* which requires that they act with integrity, objectivity, due care, competence, fully disclose any conflicts of interest (and obtain client consent if a conflict exists), maintain client confidentiality, disclose to the client any commission or referral fees, and serve the public interest when providing financial services. Most state boards of accountancy have adopted the AICPA's *Code of Professional Conduct* within their state accountancy laws or have created their own.

Chartered Alternative Investment Analyst (CAIA) – The CAIA credential is for professionals managing, analyzing, distributing, or regulating alternative investments. Candidates must complete two exam levels from the characteristics of various strategies within each alternative asset class to portfolio management concepts central to alternative investments. The Level I exam consists of 200 multiple choice questions and covers 8 topics: professional standards and ethics, introduction to alternative investments, real assets, hedge funds, private equity, structured products and risk and portfolio management. Level II exam consists of 100 multiple choice questions, plus three sets of constructed response essay questions. The curriculum is broadly divided into two sections: alternative investments and core and integrated topics. Upon obtaining the CAIA members must complete a self-evaluation tool every three years to fulfill the continuing education requirement.

Chartered Financial Analyst® (CFA®) - To earn a CFA charter, you must have four years of qualified investment work experience, become a member of the CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct on an annual basis, apply for membership to a local CFA member society, and complete the CFA Program. The CFA Program is organized into three levels, each culminating in a six-hour exam. Level I is offered in June or December and Level II and III are administered in June. In passing these exams, candidates demonstrate their competence, integrity and extensive knowledge in accounting, ethical and professional standards, economics, portfolio management and security analysis.

Financial Paraplanner Qualified Professional℠ (FPQP®) - A Financial Paraplanner Qualified Professional (FPQP) has a proven expertise in the arena of financial planning, which helps them better advise their clients. They are different than most paraplanners because the average paraplanner rarely has a formal certification. Paraplanners are part of a financial planning team and often do most tasks associated with financial planning services. However, they do not usually take the lead in terms of client relationships. One can obtain a Financial Paraplanner Qualified Professional (FPQP) designation by enrolling in and successfully completing the Foundations in Financial Planning program. The FPQP certificate is offered by the College for Financial Planning (CFFP). FPQP certificate holders need to complete 16 hours of continuing education every other year.

Nonqualified Plan Consultant (NQPC™) (Formerly Nonqualified Plan Advisor (NQPA™)) – The Nonqualified Plan Consultant (NQPC™) is an offered designation by NAPA for retirement plan professionals. They can typically advise employers on nonqualified plan design, implementation, participant communication, tax considerations and accounting matters, as well as plan financing strategies. There is a requirement of 10 hours of continuing education every year to maintain this designation.

Qualified 401(k) Administrator (QKA®) – The Qualified 401(k) Administrator (QKA) is an offered designation by ASPAA for retirement plan professionals who work primarily with 401(k) plans. They typically assist employers and consultants with the recordkeeping, non-discrimination testing and the administrative aspects of 401(k) and related contribution plans. One must have 2 years related experience in the retirement plan industry, up to 200 hours of study to complete the credential and average completion time is 18 months. There are 3 areas of study to complete and test: Retirement Plan Fundamentals, Defined Contribution Administrative Issues – Basic Concepts (DC -1) and Defined Contribution Administrative Issues – Basic Concepts (DC -2). There is a requirement of 40 hours of continuing education in a two-year cycle and renew their ASPPA Membership annually to retain their credential(s).