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Patricia A. Stahm ERPA, QPA, QKA

SENIOR RETIREMENT COMPLIANCE CONSULTANT

Pattie Stahm is a Senior Retirement Compliance Consultant for CBIZ Retirement Plan Services. Pattie is an Enrolled Retirement Plan Agent (ERPA), which allows her to represent clients before the IRS on retirement plan related issues, as well as a credentialed member of the American Society of Pension Professional and Actuaries, holding the Qualified Pension Administrator (QPA) and Qualified 401(k) Administration (QKA) designations.

Pattie has over twenty years of experience in qualified retirement plan design and administration. She specializes in defined contribution 401(k) and 403(b) plan consulting. She consults on all aspects of plan design, implementation and administration, for both small and large plans. Her expertise includes nondiscrimination testing, Form 5500 requirements, plan design and documentation issues, distribution and loan requirements, plan termination procedures and filings required under the various governmental agency corrections programs. In addition to her work with qualified retirement plans, Pattie also has extensive experience with the 5500 filing and disclosure requirements for welfare plans.

She is an active member of the Phoenix Chapter of the Western Pension & Benefits Conference, acting in a number of steering committee officer positions, including Treasurer and President. She also frequently speaks at chapter events on the topic of Form 5500 preparations and retirement plan administration.

Pattie is a member of the Executive Board of the CBIZ Women's Advantage Program, also acting as the Program Leader for the Phoenix office. Her responsibilities include facilitating personal and professional growth development programs for female associates as well as organizing business development networking events.

In the fall of 2016, Pattie joins the CBIZ Leadership Counsel, whose purpose is to better inform CBIZ leaders of opportunities and challenges facing the company, as well as provide a mechanism to solicit and consider varying views on major corporate issues and initiatives.

Pattie lives in Scottsdale with her husband Brian and children Margaret and Spencer. She enjoys volunteering with Kitchen on the Street, providing weekend food bags to school-age children who receive subsidized meals during the school week, and with Paradise Valley Girls Softball League, a recreational league for elementary and middle school age girls.

CBIZ Retirement Plan Services was named one of PLANADVISER'S Top 100 Retirement Advisers in 2014, 2015, and 2016.

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CBIZ Retirement Plan Services is a trade name under which certain subsidiaries of CBIZ, Inc. market investment advisory, third party administration, actuarial and other corporate retirement plan services. Investments and advisory services offered through CBIZ Financial Solutions, Inc., Member FINRA, SIPC and SEC Registered Investment Adviser, dba CBIZ Retirement Plan Advisory Services. CBIZ Financial Solutions, Inc. is a subsidiary of CBIZ, Inc. (NYSE Listed: CBZ)