

Therese S. Cheevers, APA, ERPA

Senior Manager, Employee Benefit Services



Range of Expertise

Therese joined Windes in 2007. She is a senior manager in the firm's Employee Benefit Services department. Therese has served the retirement plan needs of small- to middle- market corporations and unincorporated entities since 1984. Her practice focus includes pension and cash balance plans, 401(k) plans and cross tested profit sharing plans, along with plan compliance, correction, and IRS reporting.

Therese's specialty services are consultation on qualified plan issues, plan documents, and design and implementation.

Prior Experience

Prior to joining Windes, Therese held a number of key positions at administration firms, including President of Benefit Associates, Inc. of Orange, CA

Community and Professional Affiliations

- IRS Enrolled Retirement Plan Agent (ERPA)
- NIPA - National Institute of Pension Administrators, Accredited Pension Administrator (APA), *Member since 1994*
- NIPA - National Institute of Pension Administrators, Orange County Chapter, *Board Member and Secretary*

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