

## James R. Reid, ERPA, QPA

### Plan Administrator, Employee Benefit Services



#### Resident Office

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### Range of Experience

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James joined Windes in 2018 and is a plan administrator in the firm's Employee Benefit Services department. James serves the retirement plan needs of small- to middle-market corporations and unincorporated entities and has worked with qualified retirement plans since 2008. His practice focus includes defined benefit pension and cash balance plans, 401(k) plans, and cross-tested profit sharing plans, in the areas of plan documents, administration, plan compliance, corrections, and IRS reporting.

His specialty services are consultation on qualified plan issues, plan design, and non-discrimination testing.

### Education

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Bachelor of Arts, Political Science with an emphasis in Public Law  
*California State University, Long Beach*

### Community and Professional Affiliations

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- IRS Enrolled Retirement Plan Agent (ERPA)
- American Society of Pension Professionals and Actuaries (ASPPA) - *Qualified Plan Administrator (QPA), Defined Benefit Administration (DB-A)*