

Susan H. Perry, CPC, QPA, QKA, APR, ERPA, AFA, AIF, CPFA

Sue is President of Edberg & Perry, Inc., a third party non-fiduciary retirement plan administration firm located in Phoenix Arizona. She is also the President of Fiduciary Outsourcing, LLC, a 3(16) fiduciary retirement plan administration firm located in Phoenix Arizona. She is responsible for the sales and business aspects of both firms.

Sue has worked in the retirement plan sector since graduating from college at firms in Connecticut, Massachusetts, Maine and Arizona. Her past experience includes managing a third party administration firm with 25+ employees as well as managing the daily valuation recordkeeping division of a third party administration firm. She has extensive experience in the design, implementation and administration of all types of defined benefit and defined contribution plans.

She earned the Certified Pension Consultant (CPC), the Qualified Pension Administrator (QPA), the Qualified 401(k) Administrator (QKA), and the Certified Plan Fiduciary Advisor (CFPA) designations from the American Society of Pension Professionals and Actuaries (ASPPA), the Accredited Pension Representative (APR) designation from the National Institute of Pension Administrators (NIPA), the Enrolled Retirement Plan Agent designation to allow her to practice before the IRS, the Accredited Fiduciary Administration designation from the National Pension Study Group (NPSG) and the Accredited Investment Fiduciary (AIF) designation from FI360.

Sue previously served on the leadership council of ASPPA. She has also previously served as the co-chair of ASPPA's Education and Examination committee as well as having served as either a member or a co-chair of several committees, subcommittees and task forces. She is a former member of the American Institute of Retirement Education board of managers.

Sue has spoken at national forums including the NIPA's Business Management Conference, the ERPA Conference, ASPPA's Annual Conference, and ASPPA's Womens Business Leaders Forum. She has also spoken locally for Western Pension & Benefits, Scottsdale Estate Planners, Scottsdale Young Estate Planners and the Arizona Employee Benefits Forum on various retirement plan topics.