

Chad Neumann

Chad Neumann is a Senior Training Consultant with the ERISA department at Ascensus. Mr. Neumann conducts IRA training programs nationwide. His expertise includes Traditional and Roth IRAs, Coverdell education savings accounts, health savings accounts, and SEP and SIMPLE IRA plans. He lends his expertise to the distance learning curriculums, including *IRA Institute Online*, the SECURE Act micro learning series, webinars, and *IRA Essentials OnDemand*. Mr. Neumann also leads exam development and review of the Certified IRA Specialist (CIS) program and the Certified IRA Professional (CIP) program.

Mr. Neumann joined Ascensus in 2001 as a training consultant. He received a Bachelor of Science degree in Business Administration from Carroll University. He has earned the CIS designation through Ascensus, the CIP designation and Certified Health Services Professional (CHSP) designation through the National Association of Federal Credit Unions (NAFCU), and the Certified IRA Services Professional (CISP) designation through the Institute of Certified Bankers. He is a member of the Association for Talent Development (ATD) and has been designated a Certified Professional in Talent Development (CPTD).

Ascensus helps people save for what matters—retirement, education, and healthcare. With more than 40 years of experience, the firm offers tailored solutions that meet the needs of financial institutions, state governments, financial advisors, employers, and individuals. Ascensus supports more than 116,000 retirement plans, more than 5 million 529 education savings accounts, and a growing number of ABLE savings accounts. It also administers more than 1 million IRAs and more than 648,000 consumer-directed health (CDH) plans. As of March 31, 2020, Ascensus had more than \$285 billion in total assets under administration. For more information about Ascensus, visit ascensus.com.

