



Heather Benash Retirement Plan Consultant

Heather is a Retirement Plan Consultant for SVA Plumb Wealth Management, LLC.

Heather has been in plan administration since 1995 and recently started her role at SVA Plumb Financial as a Retirement Consultant. Her main functions include assisting consultants with new business and acting as the liaison between the client and the third-party administrator (“TPA”). Heather’s specialty is plan design, specifically cross-tested plans, which can maximize owner profit sharing contributions in the retirement plan.

Heather also provides day-to-day customer support for businesses and their employees in administering their 401k plans. She also assists with legal/compliance issues that arise.



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Retirement Plan Consultant

Areas of Expertise

- Employer Sponsored Retirement Plans
- Retirement plan design

Education

University of Wisconsin- Madison
Bachelor of Business Administration