



Heather Benash

Retirement Relationship Manager

Heather is a Retirement Relationship Manager for SVA Wealth Management.

Heather has been in plan administration since 1995 and recently started her role at SVA Financial Group as a Retirement Consultant.

Her main functions include assisting consultants with new business and acting as the liaison between the clients 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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Areas of Specialty

- Employer Sponsored Retirement Plans
- Retirement plan design

Education

University of Wisconsin- Madison
Bachelor of Business Administration