

# Erika M. Chavez

President & Principal Consultant



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## PRACTICES

Retirement Benefits

## PLAN TYPES

401(k)

403(b)

Non-Qualified

Defined Benefit

## AREAS OF INTEREST

Compliance

Implementation

M&A

Plan Design

## EDUCATION

Abilene Christian University

BA - Finance

Erika is a highly responsive retirement plan consultant with over 20 years' experience focused on doing what's most important – meeting client needs and keeping their best interests in mind. With a passion for her work, she thrives on solving complex problems, bringing a meticulous eye and cheerful attitude to each of her assignments.

Although independent consulting is not new for Erika, she decided to brand and launch Abacus Retirement Plan Consulting, LLC in 2017 as the next step in solidifying what has already been a rewarding career. Acting as a conduit for retirement plan sponsors and their plans, she will help effectively manage their programs and lower their risk. She is fully committed to bringing clients the most forward-thinking ideas and insights in this highly regulated and challenging environment.

With a zest for detail and thorough understanding of the nuances involved in today's retirement plan administration, Erika deftly helps clients with a broad range of issues; from smoothly guiding them through intricate merger and acquisition (M&A) transactions, to helping develop a stronger operations and administration protocol. Her clients enjoy piece of mind knowing that best practices and sound plan governance procedures are in place.

Erika was one of the thought leaders that helped launch Custodia Financial, where she spent three years developing the operational infrastructure for a new product that addresses 401(k) loan leakage. She also served as a Senior Account Executive at Lockton, a benefits consulting firm in Dallas, where she managed a \$700+ million book of business that included 401(k), defined benefit and nonqualified plans.

Erika has been recognized for her strong M&A and compliance expertise; while at Lockton she and her teammates were recognized by PLANSPONSOR magazine as a finalist for Retirement Plan Adviser Team of the Year.

Erika is devoted mother to her son, an amateur musician performing with the Southlake Community band, a devotee of Bikram yoga and an active member of her community.