

Joel J. Radakovitz CPA© QPA CPC MST CFP© AIFA©

Experience – For over 32 years Joel has worked with thousands of businesses providing independent consulting services in the design, implementation and ongoing administration of qualified retirement plans. He works with plan sponsors and trustees to select benefit plan provisions and establish fiduciary standards and implement investment policy statements. Joel assists in the selection and monitoring of investment vehicles and the design and presentation of participant education programs. He is a frequent speaker on qualified retirement plans, 401(k) cash or deferred arrangements and fiduciary standards of excellence. Joel has taught classes at the College of Lake County, Grayslake, Illinois and Rock Valley College, Rockford, Illinois as an Instructor of Taxation of Corporations, S-Corporations, Partnerships, and Individuals. He has taught Certified Financial Planning classes for the College for Financial Planning.

Notable Business Accomplishments

1987- Founded The Pension Specialists, Ltd. - Retirement Plan Third Party Administrator
2006- Founded US Retirement Plan Record Keeping LLC – Daily Valuation Record Keeper
2006- Founded Fiduciary Advisor Systems LLC – FiduciaryGuardian.com© - *The Fiduciary Due Diligence Process Administrator*©
2008- Founded USRP Portfolio Advisors LLC

Employment

1987 to Present – President and/or Managing Member of all businesses listed above

Education

Bachelor of Science in Commerce, 1980, DePaul University, Major: Accountancy
Master of Science in Taxation, 1985, DePaul University

Professional Designations and Licenses

Certified Public Accountant – Member AICPA and ICPAS; Licensed in Illinois

Qualified Pension Administrator – Certified by ASPPA since 1997

Certified Pension Consultant – Certified by ASPPA since 1984

Certified Financial Planner – Certified by the International Board of CFPs since 1991

Accredited Investment Fiduciary Analyst – Accredited by Fi360© since 2003

CEFEX© Consultant, Duly licensed to perform CEFEX© Fiduciary Excellence Assessments of Investment Managers, Investment Advisors and Investment Stewards since 2009.

Registered Representative – FINRA licensed since 1985

Registered Investment Advisor – FINRA licensed since 1999

Licensed Insurance Agent – Licensed in life, health and variable insurance products since 1982

Enrolled Retirement Plan Agent – Department of Treasury, Internal Revenue Service