

# WealthPlan Advisors

INVESTMENT & RETIREMENT PLAN CONSULTING

Portfolio Management

Retirement Planning

Estate Tax Analysis

Social Security Preparation



Andrea Donaldson-Retirement and Investment Consultant

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Andrea Donaldson has been a part of the retirement plan industry for nearly 20 years. She has been hooked on the good that comes from the industry since her first opportunity of working for a local TPA in 1998. This stems from her passion of assisting individuals in feeling safe and secure about their retirement future. She loves seeing the employees get involved in their own retirement plans and the excitement that comes from the plan sponsors because of the good things that are happening to them and their employees. Andrea has the ability to assist with any type of question, even if it is not from her area of expertise. She will make sure to give a clear and timely answer as she can take a complex idea and break it down to become more understandable. She loves implementing creative plan design ideas and strategies for business owners.



Scott Schlappi-Principal, Retirement and Investment Consultant

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Scott Schlappi CEBS, AIFA has been in the retirement plan and investment business throughout his entire career of 30 years. He is best known for his knowledge of Qualified Retirement Plans offered by corporations, governments and nonprofit organizations. Scott has spent his career helping these organizations establish, monitor and improve their retirement plans. He is well-known among ERISA councils, the governing bodies that regulate retirement plans.

In addition to being a principal of the firm, Scott is a registered investment advisor representative and has the following professional designations: Accredited Fiduciary Investment Analyst (AFIA®) and Certified Employee Benefits Specialist (CEBS).

Independent

Fee Only

Team of Advisors

ONE OF THE TOP 50 FASTEST-GROWING RIAs IN THE UNITED STATES<sup>1</sup>



TOP FINANCIAL ADVISERS 2015<sup>2</sup>

FINANCIAL TIMES



INDEPENDENT RIAs IN THE UNITED STATES<sup>3</sup>

<sup>1</sup> Meridian IQ

<sup>2</sup> Forbes, 'The Biggest, Fastest and Emerging Talent, April 2013

<sup>3</sup> FT 401 Ranking, May 2015