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This “Brochure” provides information about the qualifications and business practices of InterServ, LLC [“InterServ”]. If you have any questions about the contents of this Brochure, please contact us at 251-662-2516. The information in this Brochure has not been approved or verified by the United States Securities and Exchange Commission or by any state securities authority.

InterServ, LLC is a registered investment adviser. Registration of an Investment Adviser does not imply any particular level of skill or training. The oral and written communications of an investment Adviser should provide you with information about which you determine to hire or retain an investment Adviser.

Additional information about InterServ, LLC also is available on the SEC’s website at www.adviserinfo.sec.gov.

Item 2 – Material Changes

Additional information about InterServ, LLC is also available via the SEC's web site www.adviserinfo.sec.gov. The SEC's web site also provides information about any persons affiliated with InterServ, LLC who are registered, or are required to be registered, as investment adviser representatives of InterServ, LLC.

Effective December 10, 2014, E. Dean Speer was named as President and Chief Operating Officer for InterServ, LLC. Mr. Speer is replacing C. Paul Tyborowski in this leadership role.

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Item 4 – Advisory Business

InterServ, LLC (“InterServ”) is registered with the SEC as a Registered Investment Adviser (RIA). InterServ provides investment services primarily to retirement plan sponsors and plan investment advisors. Services include: investment performance analytics as they pertain to open-end mutual funds, collectives & ETFs (sometimes collectively referred to as “fund(s)”) and for the purpose of recommending or selecting plan investment menu options, assistance with the development and review of an Investment Policy Statement (IPS) for each plan, and asset allocations for model portfolios made available for use as plan investment options. InterServ has been in business since April 2006 and is wholly-owned by DailyAccess Corporation.

Investment Advisory Services:

InterServ will conduct the following activities for defined contribution retirement plans:

- Contract as an ERISA §3(21) investment advisory fiduciary
- Provide a draft of an Investment Policy Statement
- Analyze and consult regarding current investment menu options
- Screen for “Appropriate” investment menu options
- Develop a recommended investment menu
- Monitor investment menu options on an ongoing basis

Investment Management Services

InterServ will conduct the following activities for defined contribution retirement plans:

- Contract as an ERISA §3(38) investment manager fiduciary
- Assist with development of an Investment Policy Statement
- Provide full discretionary investment management services for covered plan assets
- Screen for “Appropriate” investment menu options (asset classes and representative funds)
- Select the investment menu, which may include InterServ’s Managed Asset Portfolios (MAPs)
- Monitor investment menu options on an ongoing basis

Clients may also choose to utilize InterServ’s Managed Asset Portfolios (MAPs) as a stand-alone investment menu option without need to engage InterServ in relation to rendering investment advice on the investment menu. Furthermore, these MAPs can be implemented in Defined Contribution, Defined Benefit and Cash Balance Plans. At the option of the plan sponsor, InterServ MAPs for Defined Contribution plans may be constructed using funds otherwise available in the plan’s investment menu or by selecting funds not otherwise available under the plan. If the plan sponsor directs that certain investment menu options be used as the underlying funds in the MAPs and InterServ is not engaged to render investment advice on the investment menu, InterServ will act as an ERISA §3(38) investment manager fiduciary only with respect to the asset allocation decisions and will have no fiduciary responsibility relating to the underlying investment menu options used in the MAPs.

Under the MAPs service option, InterServ will:

- Contract as an ERISA §3(38) investment manager fiduciary exclusively in relation to the MAPs and only to the extent of the investment discretion permitted
- Develop and administer MAPs that incorporate both risk tolerance and expected date of retirement elements (for Defined Contribution Plans only)
- Readjust the allocations in the MAPs if needed and rebalance to maintain the intended investment objectives

Combined Advisory and Management Services:

An InterServ defined contribution plan client may choose to engage InterServ for both Investment Advisory and Investment Management services. In such instances, InterServ will act as an ERISA §3(21) investment advisory fiduciary with respect to rendering investment advice on the plan menu of investment options, and as an ERISA §3(38) investment manager fiduciary with respect to the MAPs. InterServ will provide the service and report deliverables for each of these services in the same manner as described above in the respective individual service descriptions.

DailyAccess Premium Access Services:

Premium Access is a bundled retirement plan solution provided by DailyAccess Corporation. InterServ provides investment advisory and investment management services as part of the fully-bundled package that includes recordkeeping, administration, trust, and custody services. Specifically, InterServ will provide the following services for Premium Access:

- Contract as an ERISA §3(21) investment advisory fiduciary with regard to recommended investment menu options
- Provide an Investment Policy Statement
- Provide a quarterly investment monitoring report
- Make available target date and risk-based Managed Asset Portfolios, for which InterServ contracts as an ERISA §3(38) investment manager fiduciary

Item 5 – Fees and Compensation

InterServ's fees are provided in each client's written service agreement with InterServ. These fees may be negotiated on a case by case basis depending on the specific circumstances of the engagement (i.e. amount of assets, scope of services, etc.). Actual fees charged may vary significantly from client to client and may be higher or lower than indicated by standard fee schedules. The variability in fees among clients may exist even if they retain InterServ to provide similar services. Although InterServ does not have a minimum client plan asset requirement, it may charge minimum fees for certain uses of investment advisory and management services.

Investment Advisory Services:

Fees for Investment Advisory Services are generally charged as a percentage of retirement plan assets under advisement or on a fixed fee basis. InterServ's standard fee schedule for Investment Advisory Services as an ERISA §3(21) fiduciary is as follows:

Plan Assets*	Asset-Based Fee
First \$10 Million	0.10%
\$10,000,001 - \$25 Million	0.05%
Assets over \$25 Million	Custom

*net of Participant Loans and Self Directed Accounts (SDAs) (minimum fee of \$2,000 applies)

Investment Management Services:

Fees for InterServ's Investment Management Services are exclusively fee based and may be charged as a percentage of all retirement plan assets or only on those plan assets invested in the MAPs, depending

on the specific services InterServ provides. InterServ's standard fee schedule for acting with full discretion as an investment manager fiduciary under ERISA §3(38) is as follows:

Plan Assets*	Asset-Based Fee
First \$10 Million	0.25%
\$10,000,001 - \$25 Million	0.20%
Assets over \$25 Million	Custom

*net of Participant Loans and Self Directed Accounts (SDAs) (minimum fee of \$5,000 applies)

For Defined Contribution Plan clients, InterServ's MAPs are offered as either Standard or Custom portfolios. Standard MAPs involve full investment discretion for portfolio management decisions related to asset allocation and investment menu option selection. MAPs are managed in an omnibus manner on the ModelxChange platform at Mid-Atlantic Trust Company. Custom MAPs are asset allocation models built on the retirement plan's record keeping system and generally involve InterServ's having discretion only with regard to asset allocation decisions.

Generally, when MAPs are chosen as a stand-alone investment management service, InterServ's fees are charged as a percentage of assets under management and the annual fee is 0.30%. For Standard MAPs, this fee accrues daily, is deducted from the assets invested in the portfolio and is paid to InterServ quarterly in arrears. The fees for Custom MAPs are billed quarterly in arrears based on the assets under management on the last day of the previous quarter. At the plan sponsor's option, InterServ may charge fees for Investment Management Services on all plan assets. If this option is chosen, the annual fee is 0.15% and will be billed quarterly in arrears based on the plan assets as of the last day of the previous quarter.

Investment management services may also be provided to non-participant directed retirement plans such as traditional defined benefit plans or cash balance plans. Fees for these services are negotiated on a case by case basis and typically are agreed to at rates similar to those for Standard or Custom MAPs.

Combined Advisory and Management Services:

Fees for combined Investment Advisory and Investment Management services are generally charged as a percentage of retirement plan assets under advisement, but may be negotiated on bases previously described for each individual service (i.e. Investment Advisory services charged as a percentage of plan assets and Investment Management services charged as a percentage of assets under management). InterServ's standard fee schedule for the combined fee approach based on plan assets for all services is as follows:

Plan Assets*	Asset-Based Fee
First \$10 Million	0.20%
\$10,000,001 - \$25 Million	0.15%
Assets over \$25 Million	Custom

*net of Participant Loans and Self Directed Accounts (SDAs) (minimum fee of \$4,000 applies)

DailyAccess Premium Access Services:

The fees for Premium Access include an asset-based fee for InterServ's investment advisory and investment management services calculated at an annual rate of 0.25% based on all retirement plan assets. This fee is billed quarterly in arrears.

Plan Sponsor clients can choose to pay InterServ fees by either direct payment of quarterly billing invoices or having the fees deducted from plan assets, which may include a Revenue Holding Account (if available). InterServ requires plan sponsor written authorization to withdraw fees from plan assets or from a Revenue Holding Account.

InterServ fees are typically prorated based on the number of days an Account receives InterServ's services in a calendar quarter or when InterServ receives notice of termination during a calendar quarter. InterServ Service Agreements may be terminated by either party without penalty upon a minimum of thirty (30) days written notice (unless such minimum notice requirement is waived in writing by the party receiving such notice). However, any fees due to InterServ for services provided prior to date of termination will be payable upon receipt of invoice. The pro-rated portion of fees paid in advance that is not earned due to termination of services will be refunded to the client upon written request.

InterServ's Investment Advisory and Investment Management services involve the recommendation or selection of mutual funds, index funds, exchange traded funds (ETFs), and collective trust funds (together referred to as "funds"). These funds charge fees for investment management and other services that are separate and distinct from the investment advisory fees charged by InterServ. Additionally, plan sponsor clients may incur certain charges imposed by custodians and other third parties. Such third party charges or fees are exclusive of and in addition to InterServ's fees. InterServ receives no portion of these third party fees. Plan Sponsors should review each fund's prospectus or other fee disclosure material prior to investing.

Item 6 – Performance-Based Fees

InterServ does not charge performance-based fees.

Item 7 – Types of Clients

InterServ's client base consists of retirement plan sponsors, foundations, endowments, and plan investment advisors.

Item 8 – Methods of Analysis, Investment Strategies and Risk of Loss

InterServ employs a proprietary scoring methodology called the "InterScore" to provide relative evaluations of retirement plan investment menu options. The InterScore scoring process compares various funds to their peers through a number of measures based on Modern Portfolio Theory (MPT) and is designed to identify investment managers that have an established history of adding value through their management process. Sources of information used in the scoring process may include services that compile and make available various types of fund and/or portfolio manager data, in addition to computer software to assist in the calculations.

The InterScore methodology narrows the universe of potential funds to a group of five (5) or fewer funds. Each fund is then analyzed in greater detail using qualitative measures such as interviews with the fund company staff, as well as additional detailed analyses to find the best fit for the specific plan requirements, based on the following guidelines:

- **Style Analysis:** Are the fund's style characteristics near the mean of the peer group? In other words, is the fund relatively pure in its style exposure?
- **Fit with plan:** Does the fund's style characteristics overlap with other funds in the plan? Is the expense ratio in line with that desired by the plan?
- **Manager history:** Does the manager have a long history of outperforming peer funds?
- **Management Structure:** What is the fund management structure? Are there concerns with this structure?
- **Fund Family & Regulatory Issues:** What is the history of the fund and the fund family? Are there any current or historical compliance/regulatory issues?
- **Manager Commentary:** What are the fund manager's thoughts on the financial markets and the fund's performance? Is it acceptable?
- **Risk Management:** How does the fund control measure, prevent and control risk? Are the fund's risk management practices acceptable?

Asset Allocation:

InterServ's asset allocation methodologies are constructed in accordance with Modern Portfolio Theory and the Efficient Frontier concept. InterServ utilizes various software and models to aid in the determination of the efficient frontier, which is defined as a combination of investments that offers the best possible expected return for a given risk level.

Specific to a traditional Defined Benefit retirement plan, InterServ's investment methodology attempts to reduce interest rate risk by investing in assets that have a similar risk profile as the plan's expected liabilities, also known as "Liability-Driven Investing." For a Cash Balance Plan, InterServ's investment methodology attempts to achieve the plan's established investment target.

InterServ may include the availability of 12b-1 fees in its Fund selection criteria for a given plan or model, the purpose of which is to compensate one or more plan investment advisors for providing educational and/or other support services to the plan and/or the plan participants. Fund share classes that offer 12b-1 fees may be more expensive than similar share classes that do not have 12b-1 fees.

In addition to mutual funds, InterServ may also provide investment advice related to other pooled investment vehicles, including foreign mutual funds, collective funds and exchange traded funds (ETFs).

Risks and Other Limitations

Investing in mutual funds and other investments involves risk, including the risk of a loss of principal investments. There is no guarantee that InterServ's investment methodology will result in a positive investment return for any client portfolio.

Previously mentioned references to Modern Portfolio Theory and Efficient Frontier concepts should not be construed as any guarantee of efficiency in expected returns as compared to portfolio risks. InterServ applies a variety of criteria in choosing funds for each asset class, including historical returns, fee ratios, management tenure and other criteria, the application of which may cause a recommended portfolio to be theoretically less efficient than it might have been had other fund criteria been utilized. InterServ's ability to match funds to asset classes for any given plan may be limited due to limitations in the number and/or types of funds offered in any particular plan.

Please note that Managed Asset Portfolio allocations provided by InterServ do not take into account investments and other assets held outside of the retirement plans for which InterServ provides services. Plan sponsors, with fund and/or individual security investments outside of the retirement plan, foundation or endowment for which InterServ is providing advice, should speak to a qualified investment advisor prior to investing in Managed Asset Portfolios provided by InterServ.

Additionally, because InterServ is reliant upon third-parties to provide updated plan information, recommendations made by InterServ may not always capture or include changes to a roster of funds offered in a given plan if those changes were not communicated to InterServ.

Item 9 – Disciplinary Information

InterServ has no disciplinary information to report.

Item 10 – Other Financial Industry Activities and Affiliations

Certain principals and officers also serve in a similar capacity for DailyAccess Corporation. InterServ, LLC is a wholly-owned subsidiary of DailyAccess Corporation, a firm which provides recordkeeping, administration, and consulting services to employee benefit plans. DailyAccess Corporation is also the owner of DailyAccess Health and Welfare Services, LLC a wholly-owned group benefits insurance brokerage.

DailyAccess Corporation is a wholly-owned subsidiary of Verisight Inc. which also provides recordkeeping, administration, and consulting services to employee benefit plans. Verisight, Inc. also owns Verisight Trust Company, a New Hampshire-chartered limited-powers trust company. Verisight, Inc. is also affiliated with The Newport Group, Inc., which provides retirement plan administration and recordkeeping services and acts as an insurance broker for fixed insurance products as well as Newport Group Securities, Inc., a registered investment adviser.

Item 11 – Code of Ethics, Participation or Interest in Client Transactions

InterServ's officers, directors and employees may from time to time purchase or sell, or hold positions for their personal accounts, in securities that may also be, or have been, or will be recommended by the InterServ to its clients.

Code of Ethics

InterServ has adopted a Code of Ethics ("Code") to establish principles of conduct and to detect and avoid conflicts of interests that may arise between employees and clients as a result of personal investing activities. The Code is designed to ensure, among other things, that employees conduct their investing activities in accordance with applicable law and in a manner where clients' interests are placed first and foremost. InterServ's Code applies to all employees of InterServ and any account in which an employee has control or a beneficial interest as well as the accounts of family members of each employee's immediate household, as further described in the Code.

The Code requires employees to report all accounts and securities holdings covered by the Code at the commencement of their employment and annually thereafter. In addition, on a quarterly basis, all employees are required to report all covered securities transactions executed during the quarter. Additionally, the Code requires all employees to pre-clear transactions in initial public offerings and private placements.

Certain securities are exempt from the requirements of the Code including open-end mutual funds which are neither managed nor affiliated with InterServ, money market funds, money market instruments, unit investment trusts that are invested in open-end mutual funds and U.S. Government securities.

A copy of InterServ's Code of Ethics can be provided to any current or prospective client upon request.

Insider Trading Policy

In addition to its Code of Ethics, InterServ has established an Insider Trading Policy. InterServ's Insider Trading Policy includes specific requirements regarding the possession of material non-public information ("MNI") in order to avoid situations that may violate applicable statutes or regulations or create an appearance of impropriety. InterServ's Insider Trading Policy strictly forbids any employee from (i) conducting trades, either personally or on behalf of others, including clients of InterServ, while in possession of MNI; or (ii) communicating MNI to others.

Item 12 – Brokerage Practices

InterServ, LLC does not recommend brokers to its clients.

Item 13 – Review of Accounts

The reviewer of client accounts is the InterServ investment team and not any single individual. InterServ's clients are primarily retirement plans, foundations, and endowments that engage InterServ to perform analytical evaluations of the performance of retirement plan investment menu options. InterServ evaluates funds on a monthly basis and provides quarterly and annual reviews for plan sponsors and plan investment advisors.

InterServ provides plan sponsor and endowment clients with a quarterly investment review that evaluates each plan investment options' performance. Depending on the performance of each investment option and based upon the Plan's Investment Policy Statement (IPS), InterServ determines if a current investment option might need to be replaced. InterServ then evaluates potential replacements and makes recommendations to the Plan's Investment Committee for approval.

Item 14 – Client Referrals and Other Compensation

InterServ has entered into, and in the future may enter into, contractual agreements with individuals and organizations that "solicit" clients on behalf of InterServ. While the specific terms of each arrangement may differ, generally a solicitor's compensation is based upon the value of the referred client's assets to be serviced by InterServ. There is an exception to solicitor's compensation for those that are DailyAccess and Verisight employees. The compensation for these DailyAccess and Verisight employees is based on their individual Sales compensation plans. As disclosed to the plan sponsor client, the solicitor's compensation may or may not increase the referred client's fees beyond that which InterServ would otherwise charge the client for its investment services had the client come directly to InterServ.

Item 15 – Custody

InterServ does not maintain custody of client retirement plan assets.

Item 16 – Investment Discretion

InterServ exercises discretionary authority over plan sponsor client's assets for services rendered as an ERISA 3(38) investment manager as previously described in item 4. InterServ's authority to take discretionary action on behalf of a client plan is obtained through an executed Investment Fiduciary

Services Agreement. Discretion over client retirement plan assets is generally limited to one or more of the following: selecting asset classes for inclusion in the MAPs, selecting funds to represent each of these asset classes, establishing and maintaining investment allocation percentages for each asset class, and selecting the plan menu investment options that are otherwise available for plan participant directed investment.

Item 17 – Voting Client Securities

InterServ does not vote proxies on behalf of their clients, nor does InterServ render any advice with respect to the voting of proxies.

Item 18 – Financial Information

InterServ does not have any financial considerations that are likely to impair its ability to meet its contractual commitments to its clients.

Item 19 – Requirements for State-Registered Advisers

Not applicable

ADV Part 2B SUPPLEMENTAL BROCHURE

**InterServ, LLC
307 University Blvd. North
Building 3, Suite 2900
Mobile, AL 36688
251-662-2516**

**Steven F. Schreiber
E. Dean Speer
Andrew A. Brandt
Lindsey E. Ellis**

Dated: March 31, 2015

This brochure supplement provides information about the above-named professional that supplements the InterServ, LLC (“InterServ”) brochure. You should have received a copy of that brochure. Please contact us by email at jwood@interservllc.com if you did not receive InterServ’s brochure or if you have any questions about the contents of this supplement.

Additional information about the above-named professionals is available on the SEC’s website at www.advisorinfo.sec.gov.

ADV Part 2B SUPPLEMENTAL BROCHURE

InterServ, LLC

***Note:** A description of the professional designations held is provided at the end of this document.

Item 1: <i>Name/Year of Birth/Title</i>	Steven F. Schreiber (1975) <i>Executive Director of Investments, InterServ, LLC</i>
Item 2: <i>Educational Background</i>	B.A., Economics and International Studies, University of Richmond. M.B.A., Masters of Business Administration, Finance and Investments, University of Miami
Item 2: <i>Business Background:</i>	Executive Director of Investments, InterServ, LLC 8/2008 – Present Senior Financial Analyst, Windham Vacation Ownerships, 4/2008-8/2008 Senior Financial Analyst, HD Supply, 5/2007 – 4/2008 Manager of Business Analysis, InCharge Institute of America, Inc. 2003 – 5/2007
Item 3: <i>Disciplinary Information</i>	None.
Item 4: <i>Other Business Activities</i>	None.
Item 5: <i>Additional Compensation</i>	None.
Item 6: <i>Supervision</i>	InterServ, LLC has developed policies and procedures to guide the supervision of all supervised persons of the firm and the business of the firm. The person responsible for supervision of the firm is E. Dean Speer. Mr. Speer's contact information is (251) 662-2510.
<i>Professional Designation:</i>	Chartered Financial Analyst (CFA)

Item 1: <i>Name/Year of Birth/Title</i>	E. Dean Speer (1964) <i>President & COO</i>
Item 2: <i>Educational Background</i>	B.S., Accounting, University of Alabama Masters of Science in Taxation, University of Central Florida
Item 2: <i>Business Background:</i>	President & COO, InterServ, LLC 12/2014 – Present Managing Director, InterServ, LLC 03/2011 – 12/2014 Vice President of Accounting and Finance, DailyAccess Corporation 03/2011-12/2014 Treasury Manager, HSBC Bank (Cayman), LTD 10/2009-09/2010 Portfolio Manager, StableRiver Capital Management, LLC 06/2001-10/2009
Item 3: <i>Disciplinary Information</i>	None.
Item 4: <i>Other Business Activities</i>	None.
Item 5: <i>Additional Compensation</i>	None.
Item 6: <i>Supervision</i>	InterServ, LLC has developed policies and procedures to guide the supervision of all supervised persons of the firm and the business of the firm. The person responsible for supervision of the firm is E. Dean Speer. Mr. Speer's contact information is (251) 662-2510.

<i>Professional Designations:</i>	Chartered Financial Analyst (CFA) Certified Public Accountant (CPA) Chartered Global Management Accountant (CGMA) Certificate in Investment Performance Measurement (CIPM)
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Item 1: <i>Name/Year of Birth/Title</i>	Andrew A. Brandt (1985) <i>Investment Analyst</i>
Item 2: <i>Educational Background</i>	B.A., Finance, University of South Alabama
Item 2: <i>Business Background:</i>	Investment Analyst, InterServ LLC 4/2012 –Present Senior Compliance Analyst, DailyAccess Corporation, 6/2008 –4/2012
Item 3: <i>Disciplinary Information</i>	None.
Item 4: <i>Other Business Activities</i>	None.
Item 5: <i>Additional Compensation</i>	None.
Item 6: <i>Supervision</i>	InterServ, LLC has developed policies and procedures to guide the supervision of all supervised persons of the firm and the business of the firm. The person responsible for supervision of the firm is E. Dean Speer. Mr. Speer's contact information is (251) 662-2510.
<i>Professional Designations:</i>	Qualified 401(k) Administrator (QKA) Qualified Pension Administrator (QPA)
<i>Professional Certification:</i>	Series 65

Item 1: <i>Name/Year of Birth/Title</i>	Lindsey E. Ellis (1981) <i>Investment Specialist</i>
Item 2: <i>Educational Background</i>	B.S., Marketing, University of South Alabama M.B.A. Masters of Business Administration, University of South Alabama
Item 2: <i>Business Background:</i>	Investment Specialist, InterServ, LLC 8/2008 –Present
Item 3: <i>Disciplinary Information</i>	None.
Item 4: <i>Other Business Activities</i>	None.
Item 5: <i>Additional Compensation</i>	None.
Item 6: <i>Supervision</i>	InterServ, LLC has developed policies and procedures to guide the supervision of all supervised persons of the firm and the business of the firm. The person responsible for supervision of the firm is E. Dean Speer. Mr. Speer's contact information is (251) 662-2510.
<i>Professional Certification:</i>	Series 65

Summary of Professional Designations

Chartered Financial Analyst (CFA)

To enroll in the CFA program, an individual must have a bachelor's degree or equivalent, or four years of qualified work experience. A CFA designation requires an individual to pass three exams that test the individual's knowledge of investments and finance. The CFA candidate is also required to understand and sign a professional conduct statement which commits the individual to the CFA Institute's Code of Ethics and Standards of Professional Conduct. These require adherence to a high level of integrity, professionalism and duty to clients among others.

Certified Public Accountant (CPA)

In order to become a CPA in the United States, the candidate must sit for and pass the Uniform Certified Public Accountant Examination, which is set by the American Institute of Certified Public Accountants (AICPA). Eligibility to sit for the Uniform CPA Exam is determined by individual state boards of accountancy. All states have adopted what is known as the "150 hour rule", which usually requires an additional year past a regular 4 year college degree, or a master's degree.

Certificate in Investment Performance Measurement (CIPM)

To be considered for the CIPM designation the candidate must successfully complete two exams: the CIPM Principles Exam and the CIPM Expert Exam. The candidate must also agree to abide by the CIPM Associate Code of Ethics and Standards of Professional Conducts which is done by signing a Candidate Professional Conduct Statement as part of each exam registration.

Chartered Global Management Accountant (CGMA)

The CGMA demonstrates management accounting expertise, determination and commitment to achieving sustainable business success. The issuing body is a joint venture owned by the American Institute of Certified Public Accountants (AICPA) and the Chartered Institute of Management Accountants (CIMA). The designation is available to all members of CIMA and to AICPA voting members with management accounting experience who commit to a program of continuing professional education.

ASPPA Qualified 401(k) Administrator (QKA)

To enroll in the Qualified 401(k) Administrator (QKA) credential, an individual must have a minimum of two years experience in retirement plan related matters. A QKA credential requires an individual to pass four exams that tests the individual's knowledge of retirement plan administration and compliance issues. All credentialed members must acquire 40 hours of Continuing Education (CE) credits in a two-year cycle.

ASPAA Qualified Pension Administrator (QPA)

To enroll in the Qualified Pension Administrator (QPA) credential, an individual must have a minimum of two years experience in retirement plan-related matters. A QPA designation typically requires an individual to have the QKA credential along with two additional exams that tests the individual's knowledge of administrative issues relating to defined benefits plans. All credentialed members must acquire 40 hours of Continuing Education (CE) credits in a two-year cycle.