

**Kathy Moore**  
**Pension Administrator**  
kmoore@planadministration.net

---



Kathy joined Plan Administration & Consulting, LLC (PAC) in 2004. As a Pension Administrator, she is responsible for ensuring PAC clients are in full compliance with the latest rules and regulations dictated by the Internal Revenue Service (IRS) and the Department of Labor (DOL). In addition, Kathy designs and administers pension plans for clients in various industries including automotive dealerships, construction and physician practices.

In her role, Kathy works with various types of pension plans based on the needs and goals of her clients. Common pension plans she oversees include Profit Sharing, 401(k), Safe Harbor and Cross-tested.

One of Kathy's top priorities as a Pension Administrator is keeping a close watch on new IRS and DOL regulations. Her proactive service philosophy matched with her close attention to detail allows Kathy to inform and advise clients on new regulations affecting their pension plan. She assists clients in the implementation of necessary changes to ensure compliance and maximum benefits to employees.

Kathy attributes her success to the encouragement and support of the mentors she's worked with over the years. She also recognizes opportunities for continuing professional education as a key contributor to her success. Ongoing education and exposure to new ideas allows Kathy to stay abreast of industry best practices and enables her to provide superior advice and service to clients.

Kathy grew up in Memphis and currently resides in Lakeland, Tennessee. While away from the office, she enjoys reading, attending concerts and spending time with family.

**Professional Designations and Licenses**

- Certified Retirement Services Professional (CRSP)

**Memberships**

- Institute of Certified Bankers (ICB)

**Education**

- University of Tennessee, Martin  
– Bachelor of Science, Psychology, (1993)

**Kathy's Personal Mission Statement**

*"My goal is to provide exceptional service to clients by keeping their plans in compliance with all current regulations and being readily available to proactively address their needs."*



Independent Member of BKR International