



## FOR IMMEDIATE RELEASE

Contact:

Michael S. Kryza, CFA  
Chief Corporate Development Officer  
(917) 620-3771  
[mkryza@usrbpartners.com](mailto:mkryza@usrbpartners.com)

## Pension Planning Consultants Joins U.S. Retirement & Benefits Partners

Iselin, NJ, October 18, 2024 – U.S. Retirement & Benefits Partners (USRBP) announced today the acquisition of Pension Planning Consultants (PPC), with its main office based in Albuquerque, NM.

PPC, an independent retirement plan third party administrator, has been providing successful solutions and strategies for compliance administration and plan consulting, design and installation for over 50 years. Tim Haist, PPC president since 1992, will assume the role of Managing Partner and continue to lead the business.

Haist said, “We are very excited to be partnering with a dynamic firm like USRBP. They have been at the forefront of adopting new technologies that allow their Partner Firms to better serve clients. Our PPC clients have always been our top priority, and we are excited to work with the USRBP team to continue providing world-class service for years to come.”

“PPC is a strong match for us. They have a people-oriented culture, great client relationships and tremendous industry expertise. We look forward to working closely with the PPC team to help advance our strategic vision and expand our retirement plan TPA services in the Southwest. Additionally, we’re excited about the opportunity to utilize our resources to help accelerate PPC’s growth as we move forward,” said Patrick Hale, Managing Partner of The Retirement Plan Company (TRPC), a USRBP Partner Firm.

Megan Schneider, USRBP CEO, said, “We’re excited to welcome Tim and the PPC team to USRBP. PPC is a strong addition that supports the expansion of our Southwest footprint. We look forward to continued growth together.”

### About U.S. Retirement & Benefits Partners

U.S. Retirement & Benefits Partners, with headquarters in Iselin, NJ, is one of the nation’s largest independent, national financial services firms specializing in employee benefit and employer-sponsored retirement plans in the K-12 public school, governmental, corporate, and non-profit markets. Through 61 acquisitions throughout the U.S., USRBP serves over 15,000 employer groups with 3.5 million participants. For more information, visit [www.usrbpartners.com](http://www.usrbpartners.com).



**FOR IMMEDIATE RELEASE**

Contact:  
Michael S. Kryza, CFA  
Chief Corporate Development Officer  
(917) 620-3771  
[mkryza@usrbpartners.com](mailto:mkryza@usrbpartners.com)

*About Wise Rhino*

PPC received advisory services from Wise Rhino Group, a firm specializing in M&A advisory for the financial services sector, including third-party administration and wealth & retirement advisory firms. Wise Rhino Group's deep understanding of the financial services market enables them to offer valuable guidance in finding partners that align with their clients' culture, business, and goals. For more information, visit [wiserhinogroup.com](http://wiserhinogroup.com).

###