



Susan D. Diehl

QPA, CPC, ERPA, TGPC, BCFT™
President
PenServ Plan Services, Inc.

Susan D. Diehl, president of PenServ Plan Services, Inc., is a preeminent retirement plan and benefits expert. Her impressive array of credentials includes Qualified Pension Administrator (QPA), Certified Pension Consultant (CPC), Tax-Exempt and Governmental Plan Consultant (TGPC), Enrolled Retirement Plan Agent (ERPA), a venerable designation that qualifies her to represent PenServ clients before the Internal Revenue Service (IRS) for audits or examinations, and Board Certified Fiduciary™ (BCFT™).

Susan has served on renowned committees at the IRS including the Advisory Committee on Tax Exempt and Government Entities (ACT), where she helped form the IRS 403(b) Liaison Group, which brings issues involving these plans to the IRS and provides support to employers and financial institutions working with 403(b) plans. Because of her expertise, Susan testifies before the IRS and the Department of Labor (DOL) on retirement plan regulatory issues and serves as chair of the National Tax-Deferred Savings Association (NTSA) Government Affairs Committee, and the Legislative Relations Committee of the American Society of Pension Professionals and Actuaries (ASPPA).

Over the years Susan has served on the IRS Information Reporting Program Advisory Committee (IRPAC) and participated in various DOL committees, including the Advisory Council of the Employee Retirement Income Security Act of 1974 (ERISA). A past-president of the NTSA, Susan also served as a board member of the American Retirement Association and on the 403(b) Advisor Editorial Committee for the magazine *403(b) Advisor* published by the National Tax Sheltered Accounts Association.

The NTSA has honored Sue with the 2023 Richard Ford Volunteer Service Award and the 2012 Bob Schiller Meritorious Service Award. As a leader among women, she was bestowed the Athena Award for promoting women in business and was inducted to the Athena Hall of Fame in Michigan. In 2013, the Upper Dublin Education Foundation recognized Susan with the Outstanding Citizen Award for her exemplary charitable service, volunteer work, and long-term community involvement. In 2016, the NTSA presented her with the Kelli Award and recognized her service on the NTSA Leadership Council.

While her expertise and acumen keep her in high demand within the industry, Susan's commitment to her PenServ clients is paramount every day. In her spare time, she volunteers as a host coordinator with Family Promise (formerly Interfaith Housing Alliance) sheltering and helping homeless and displaced families find permanent housing.