



SERVICES

Consulting for Business
Consulting for Individuals
Employee Benefits Plan
Tax

MEMBERSHIPS AND AFFILIATIONS

- American Retirement Association

CERTIFICATIONS AND LICENSES

- Expert level American Retirement Association designations including QPA (Qualified Pension Administrator), QKC (Qualified 401(k) Consultant), and QKA (Qualified 401(k) Administrator)
- Elevated level of industry, IRS, and DOL technical knowledge

EDUCATION

- Bachelor of Science in Business Administration with a Minor in Finance

HEATHER SINCLAIR-SMELLEY

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EMPLOYEE BENEFITS CONSULTANT

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Heather Sinclair-Smelley is an Employee Benefits Consultant in the Firm's Employee Benefit Group. She helps clients with benefits management, planning, compliance, corrections and administration. Her expertise covers group and individual benefits including retirement, health and welfare, fringe benefits, payroll consulting, 529 Plans, state retirement programs, required minimum distribution rules, and related taxation and reporting. Heather and the team also provide full retirement plan services such as support to design a new plan, Plan Documents, nondiscrimination testing, form 5500 preparation and filing, plan corrections and more.

PROACTIVE

Heather is an accomplished, goal-driven, and dependable business professional with proven success as an ERISA Compliance Consultant. She is a team player with excellent communication skills who works well under pressure to meet goals and deadlines while performing multiple tasks effectively. She provides solid customer service to ORBA clients, providing a high level of service and knowledge. Heather has a proven ability to multitask while completing assignments in a timely manner and in a fast-paced environment.

OUTSIDE OF THE OFFICE

Heather loves to spend time outdoors with her family. She lives on the Gulf Coast so a few of her favorite activities are walking at the bird sanctuary in the Marsh to view all the wildlife and visiting the beach.