

Donna Bianchi

CPC, QPA, QKA

DC Plan Management Consultant



CURRENT RESPONSIBILITY

Donna is a DC plan management consultant in Milliman's Employee Benefits Administration practice. Donna joined the firm in 2000.

EXPERIENCE

Donna and her team are responsible for providing the following services to their 401(k), profit-sharing, 457, and 403(b) clients:

- Daily recordkeeping services
- Compliance with ERISA and related regulations
- Review and reconciliation of participant data
- Reconciliation of plan assets
- Preparation of IRS Form 5500
- Assistance to plan auditors
- Day-to-day assistance to the plan sponsor
- Drafting of plan documents, plan amendments, and summary plan descriptions
- Review of benefit distribution packages
- Review of participant loan packages

The primary goal of Donna's team is to provide high-quality service to clients and to assure client satisfaction with all of Milliman's services.

In addition, Donna provides consulting services to her clients with respect to plan design and employee communications.

Donna previously worked in the insurance industry.

PROFESSIONAL DESIGNATIONS

- Certified Pension Consultant (CPC), American Society of Pension Professionals and Actuaries (ASPPA)
- Qualified Pension Administrator (QPA), ASPPA
- Qualified 401(k) Administrator (QKA), ASPPA

AFFILIATIONS

Member, American Society of Pension Professionals and Actuaries

EDUCATION

BS, Finance, Siena College

