

### Daniel L. Bernert

CPA  
Principal, Practice Leader



#### CURRENT RESPONSIBILITY

Dan Bernert is a principal and co-practice leader for the Walnut Creek, Calif., office of Milliman. In this role, he oversees both daily valuation and balance forward clients.

He is also responsible for the overall operation and staffing of the Walnut Creek office of Milliman and shares responsibility for the management of Milliman's Western Region Defined Contribution practice.

#### EXPERIENCE

Dan works closely with clients of all sizes in the design, installation, and administration of their qualified retirement plans. Dan's focus is to ensure that the retirement plan continually fits the company's objectives, while meeting all compliance requirements.

Dan's clients span a broad range of industries including, but not limited to, professional services, real estate, health care, financial services, and venture capital.

Dan has 25 years of tax, accounting, and retirement-plan experience, including 12 years with Milliman and Lawrence Johnson & Associates (LJA), which Milliman acquired in 2006.

Prior to joining LJA in 1996, Dan served as chief financial officer for the Golden State Warriors NBA basketball team (1991-1996) and senior tax manager for a large international public accounting firm (1985-1991).

#### PROFESSIONAL ACTIVITIES

Dan regularly conducts employee enrollment meetings and presentations to his client's retirement plan advisory committees. These meetings generally focus on plan design issues and opportunities created by new tax legislation and other rule changes.

Dan has authored numerous newsletters on current developments in the retirement plan industry.

#### PROFESSIONAL DESIGNATIONS

- Member, California Society of Certified Public Accountants
- Member, American Society of Pension Professionals & Actuaries (ASPPA)
- Member, Western Pension & Benefits Conference
- Licensed Registered Investment Advisor Representative

#### EDUCATION

- BS, Business Administration with emphasis in Accounting and Finance, University of California, Berkeley
- MS, Taxation, Golden Gate University

