

## Jeffrey T. Marzinsky

CPC, CMFC, APA, MCDBA

Principal, Employee Benefits Consultant



### CURRENT RESPONSIBILITY

Jeff is a principal and investment consultant of Milliman. He joined the firm in 1994.

### EXPERIENCE

Jeff is responsible for providing investment and retirement plan consulting services to Milliman's clients in the Northeast region.

This includes:

- Working with retirement committees to develop fiduciary procedures and controls
- Developing asset allocation and investment policy statements for retirement plans
- Investment manager selection, performance monitoring, and due diligence
- Plan design, compliance and nondiscrimination testing for retirement plans

Jeff also works on the design and implementation of new systems. He has developed systems for investment performance analysis and reporting, client management, and compliance testing.

Jeff's investment advisory team performs investment research and performance monitoring, and prepares recommendations for plan investments.

Jeff serves on and has chaired several internal Milliman committees, including the Defined Contribution Strategic Planning Group, Technology Committee, the Investment Strategic Planning Group, and the Milliman Employee Education Team. Currently, he is the chair of the national Investment Strategic Planning Group. He also serves on investment committees with the United Way and Adirondack Mountain Club.

### PRESENTATIONS AND PUBLICATIONS

Jeff is a frequent speaker at client and professional seminars.

Jeff has authored several articles and white papers:

- A 401(k) plan that works – The “bundled unbundled” solution
- Hidden costs: Are 401(k) fees taking a bite out of retirement savings?
- I think I'm a fiduciary
- Fiduciary compliance reviews: For your defined-contribution plan
- 401(k) plan sponsors: More disclosures to help you meet your fiduciary responsibilities
- Uncovering 401(k) fees in hiding
- Considerations in Choosing a Target Date Fund

He has also been quoted by the New York Times, Workforce and GAO.

### PROFESSIONAL DESIGNATIONS

- Certified Pension Consultant (CPC)
- Qualified Pension Administrator (QPA)
- Accredited Pension Administrator (APA)
- Chartered Mutual Fund Counselor (CMFC)
- Certified Business Manager (CBM)
- FINRA Series 7, 63, and 65
- Microsoft Certified Database Administrator (MCDBA)
- Microsoft Certified Professional (MCP)
- Master Microsoft Office User Specialist (MOUS)
- Associate Member, eMarketing Association

### EDUCATION

- BS, Finance, Siena College

