

Randy Mitchell

CIMA
Principal



CURRENT RESPONSIBILITY

Randy is a principal and serves as the investment services practice manager in the Dallas office of Milliman. He is a Certified Investment Management Analyst (CIMA) with more than 15 years of experience in the industry. He joined the firm in 1992.

EXPERIENCE

Prior to becoming a principal, Randy served as National Transactional Recordkeeping Center coordinator, wherein he facilitated the development of Milliman's transactional-based administration system, voice response system, and trustee interfaces.

Randy's technical experience includes assessing investment management risk, analyzing and reporting investment results, along with conducting investment manager search and selection engagements. He services Milliman's clients by:

- Assisting clients in meeting their fiduciary responsibilities regarding investments
- Explaining the investment process (selection of investment options) and the asset allocation process (classes vs. individual securities)
- Assisting in the development of an investment policy statement
- Measuring and reporting investment performance and periodically reviewing each client's investment options
- Defining investment manager performance measurement criteria
- Conducting client investment performance reviews
- Developing asset allocation strategies for participant-directed plans
- Developing asset allocation strategies for defined benefit plans

In the defined contribution area, Randy's background includes plan administration, systems development, new-plan implementation, and plan design.

PROFESSIONAL DESIGNATIONS

- Certified Investment Management Analyst
- Registered Investment Advisor
- NASD and SEC Licenses:
- NASD Series 65: Registered Investment Advisor Exam
- NASD Series 63: Uniform Securities Agent State Law Exam

AFFILIATIONS

- Member, Society of Professional Administrators and Recordkeepers
- Member, Investment Management Consultants Association

EDUCATION

- BBA, Finance, University of Texas at Arlington

