

RICHARD LEVESQUE

CPC, QPA, QKA

Regulatory Consultant

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Current Responsibility

Richard Levesque is a regulatory consultant for the Milliman Employee Benefits Administration and Consulting Practice (EBAC). He has been in the retirement plan industry since 1991, and joined Milliman in 1998.

Professional Work Experience

Richard has worked in the retirement plan industry for more than 25 years. Before joining Milliman, he worked for a banking institution where he provided trustee services for their retirement plan business and benefit plan administration in corporate human resources.

He has experience with plan design, plan administration, nondiscrimination testing, government reporting, relationship management, and consulting on 401(k), 403(b), profit-sharing, money purchase, employee stock ownership, and nonqualified deferred compensation plans.

Currently, he provides ERISA regulatory compliance consulting services relating to plan documents, plan amendments, participant disclosures, merger and transfer agreements, plan terminations, technical research, IRS submissions, and correction programs and filings.

Professional Designations

- Certified Pension Consultant (CPC)
- Qualified Pension Administrator (QPA)
- Qualified 401(k) Administrator (QKA)

Education

- Major in Finance, Siena College
- AAS, Accounting, Hudson Valley Community College

Affiliations

Member, American Society of Pension Professionals and Actuaries