

Employee Benefits Administration

Serving our clients to protect the health and financial well-being of their employees is at the core of who we are and is central to our mission. One of the ways we support our mission is through retirement and employee benefits administration. Retirement services have been our focus since 1947, and it's why we're the leading global provider of actuarial, administrative, and recordkeeping services for plan sponsors. Known for our unbiased approach, we create custom retirement plan designs and benefits administrative solutions to meet our clients' needs.

Why Milliman?

Total retirement outsourcing (TRO)

Milliman's total retirement outsourcing services enable employers to simplify their retirement plan administration role while enhancing employees' understanding and appreciation of their retirement program.

Our premier TRO services provide a seamless experience for plan sponsors and participants to support your total retirement program. Integrated services include recordkeeping, administration, actuarial consulting, compliance services, and participant communication for DC and DB plans.

Independent, objective perspective

Milliman partners with our clients to assess their needs and works closely with organizations to create a customized administrative package. As an independent service provider that does not sell financial products, we offer unbiased advice. All of our recommendations are based solely on the best interests of our clients and their participants.

Custom solutions

Benefits administration at Milliman is not a one-size-fits-all commodity. We consider the uniqueness of your goals, your plan, your culture, your workforce and provide customized solutions to meet your specific fiduciary and business needs.

Flexible, non-proprietary fund choices

Our investment platform features true open architecture, with more than 400 fund families and 20,000 funds. You have access to separate account managers for custom investment solutions for clients' DC or DB plans.

Expert consulting

Our consultants are critical thinkers and problem solvers, who blend their deep experience and technical knowledge with our comprehensive analytical tools to optimize your plan design. As experts in every facet of retirement plan design and administration, we provide services from basic to advanced, such as cross-testing and complex compliance issues, company stock and nontraditional assets, unitization for non-daily assets or custom portfolios, plans with multiple brokerage needs, and plan design modeling tools.

Superior participant experience

Our strategy-based, multi-media experience is designed to engage employees and drive behavior change. The goal? To help them RISE™ Above and achieve healthy financial outcomes. Our curriculum is customized at the plan level and personalized at the participant level, with a powerful yet simple website, a mobile app and full-service Call Center.

Comprehensive Services

- DC consulting, recordkeeping and administration
 - 401(k), 403(b), 401(a), 457 plans
 - ESOPs
 - Non-qualified plans
 - Money purchase, profit-sharing plans
- DB administration and consulting
 - Pension
 - Cash balance
- TRO administration and consulting
- Communication & education
- Health & welfare outsourcing
- Corporate plans
- Taft-Hartley plans
- Multiple employer plans (MEPs)

Put the power of Milliman's independent thinking, custom solutions and expert consulting to work for you.

About Milliman

1,100+

retirement
outsourcing clients

3,000+

actuarial &
consulting clients

\$1 Trillion+

combined assets of
plans we consult on

More than **\$1.1 Billion** in annual
firm revenue



1947
the year we
were founded

62
offices
worldwide

3,500+
company
employees



Top 10
largest pension
administrators in
mid to large market



250+
Best-in-Class Awards
from PLANSPONSOR
Magazine since 2012

100
largest corporate
US pension plans in
our monthly Pension
Funding Index

\$100 Billion in administration
assets



44 out of 50

insurers globally are
Milliman clients



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