

JON LLOYD

ERPA, QPA, QKA

Principal and Senior DC Compliance Consultant

jon.lloyd@milliman.com

+1 214 863 5140



Current Responsibility

Jon Lloyd is a principal and senior DC compliance consultant for the Milliman Employee Benefits Administration Practice. He joined the firm in 2007.

Professional Work Experience

Jon's responsibilities include managing a team of compliance consultants that complete the annual nondiscrimination work, consult on plan compliance, assist and complete governmental filings, work with independent auditors, and consult on plan design and issue resolution. Jon has extensive 401(k), 457, and 403(b) experience and knows the processes and procedures necessary for the successful transfer of assets from various 403(b) product providers. He also works with frozen annuity assets at legacy providers. He joined the retirement industry in 1994.

Previously, Jon was a regional pension consultant for Standard Insurance Company. In this role, he was responsible for providing consulting services to clients on fund reviews, plan design, and ERISA compliance. His client assignments included Texas, Oklahoma, and Arkansas territories. He also served as Standard's large case research development team lead.

Professional Designations

- Enrolled Retirement Plan Agent (ERPA), Internal Revenue Service
- Qualified Pension Administrator (QPA), American Society of Pension Professionals and Actuaries (ASPPA)
- Qualified 401(k) Administrator (QKA), ASPPA

Education

BS, Portland State University, Portland, OR