

David Martin

CPC, QPA, QKA
DC Plan Management Consultant



CURRENT RESPONSIBILITY

David Martin is a consultant with Milliman's Employee Benefits Administration Practice in Minneapolis, MN. David joined the firm in 2016 and brings with him over 10 years of plan administration experience.

EXPERIENCE

David and his team are responsible for providing the following services to their 401(k), profit-sharing, 457, 403(b), and ESOP clients:

- Daily recordkeeping services
- Compliance with ERISA and related regulations
- Review and reconciliation of participant data
- Reconciliation of plan assets
- Assistance to plan auditors
- Day-to-day assistance to the plan sponsor
- Drafting of plan documents, plan amendments, and summary plan descriptions
- Review of benefit distribution packages
- Review of participant loan packages

The primary goal of David's team is to provide high-quality service to clients and to assure client satisfaction with Milliman's services.

In addition, David provides consulting services to his clients with respect to plan design and employee communications.

PROFESSIONAL DESIGNATIONS

- Certified Pension Consultant (CPC), American Society of Pension Professionals and Actuaries
- Qualified Pension Administrator (QPA), American Society of Pension Professionals and Actuaries
- Qualified 401(k) Administrator (QKA), American Society of Pension Professionals and Actuaries

AFFILIATIONS

Member, American Society of Pension Professionals and Actuaries

EDUCATION

BS, English, Minnesota State University, Mankato

