

KAREN MATHIS

CPC, QKA, QPA

DB Client Relations Manager I

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Current Responsibility

Karen Mathis is a client relations manager in the Milliman Employee Benefits Administration and Consulting Practice. She is responsible for the delivery of all aspects of defined benefit administration services to her plan sponsor clients and their participants. Karen joined Milliman in 2010.

Karen's experience includes defined benefit pension administration for traditional qualified plans and cash balance plans including calculations, payments, QDRO processing, implementations, and lump sum windows. Her focus is to provide the participant and the client with a high quality product. She builds close relationships with her client contacts to better understand and anticipate their needs.

Professional Work Experience

Karen started in the retirement industry in 1998.

Professional Designations

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

Education

BS in Mathematics, Middle Tennessee State University, Murfreesboro, TN

Affiliations

Member, ASPPA