

# JIM QUARTARONE

Regional Sales Manager

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## Current Responsibility

Jim Quartarone is a regional sales manager with the Milliman Employee Benefits Administration Practice. In this role, he is responsible for building and maintaining relationships with retirement plan advisors and consultants from the Dakotas to the West Coast, plus Illinois. In addition, he leads the sales process to ensure the best possible outcomes for plan sponsors and participants. Jim is also responsible for the sales and marketing of all services delivered by Milliman. He joined the firm in 2022.

## Professional Work Experience

Based in Colorado, Jim has been in the retirement industry since 1992, and focuses exclusively on the institutional retirement market and client consulting. He has deep experience with defined contribution, defined benefit, and non-qualified plans, and has extensive knowledge in all aspects of plan design and administration, as well as client and advisor relationship management. Before entering the retirement industry, Jim served as a captain in the U.S. Army.

Before joining Milliman, Jim served as a Senior Retirement Sales Executive and Vice President at T. Rowe Price, where he focused mainly on ERISA-qualified and nonqualified retirement plans for the Midwest region. Additional experience includes serving in institutional sales and leadership roles at Aon Hewitt and Fidelity Investments.

## Professional Designations

- FINRA Series 6: Investment Company Products/Variable Contracts Representative
- FINRA Series 7: General Securities Registered Representative
- FINRA Series 63: Uniform Securities Agent State Law Exam

## Education

BS, Political Science, Bridgewater State University, Bridgewater, MA