

### Lynda L. Schoonmaker

Defined Contribution Analyst



#### CURRENT RESPONSIBILITY

Lynda is a defined contribution analyst with Milliman's Northeast Regional Defined Contribution Processing Center in Albany, New York. She has been with the Albany office since 1996.

#### EXPERIENCE

Lynda's responsibilities include:

- Balance-forward recordkeeping
- Compliance with ERISA and related regulations
- Preparation of census data requests
- Review and reconciliation of participant data
- Reconciliation of plan assets
- Preparation of IRS Form 5500 and other governmental forms
- Assistance to plan auditors
- Day-to-day assistance to the plan sponsor
- Preparation and review of benefit distribution packages
- Preparation and review of participant loan packages
- Assuring client satisfaction with all of Milliman's services

In addition, Lynda is responsible for all aspects of nondiscrimination testing and compliance issues for many of the clients in the processing center.

Lynda provides services to qualified and nonqualified defined contribution plans, including profit sharing, 401(k), 403(b), 457, and ESOP plans.

#### EDUCATION

- BS, Business Administration, State University of New York at Oswego

