

KATHERINE SMITH

CPC, QPA, QKA, MBA

Consultant and Relationship Manager

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Current Responsibility

Katherine Smith is a relationship manager and defined contribution plan consultant for the Milliman Employee Benefits Administration Practice. She rejoined the firm in 2014.

Katherine is currently responsible for consulting primarily on defined contribution plans. She assists clients with plan design and provides ongoing review of plan operations for which she recommends changes when needed and reviews plan demographics. Katherine also recommends ways to improve participation, reviews compliance tests, and recommends possible steps to avoid or mitigate test failures. Her key objectives are to ensure a client's plan is serving its intended purpose of helping employees save for retirement effectively and to make sure plan design and operations are in sync.

Professional Work Experience

Katherine has more than 20 years of consulting and recordkeeping administration experience involving operations, compliance, employee education, merger and acquisition (M&A), plan conversions, and integration strategies. Her relationship management and consulting expertise include assisting clients with plan design, plan implementation, and ongoing administration of retirement programs.

Prior to re-joining Milliman, Katherine was the operations leader at a global employee health and benefits firm in Hong Kong for three years. Katherine also worked as a training director with a major third-party administrator firm.

Professional Designations

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

Education

- MBA; City University, Seattle, WA
- BS, Business; East China University of Science & Technology, Shanghai, China

Affiliations

- Member, American Society of Pension Professionals & Actuaries
- Member, Western Pension & Benefits Conference