

Sandra L. Birdsong

CPA, AIF®

Relationship Manager



CURRENT RESPONSIBILITY

Sandy Birdsong is a benefits consultant for the Milliman Employee Benefits Administration practice. With more than 30 years of experience, Sandy has worked in the employee benefits field most of her career.

EXPERIENCE

Prior to joining Milliman, Sandy worked with Regions Trust as a business development officer specializing in retirement plans and benefits consulting. She also worked as a senior ERISA compliance specialist for Invesco Retirement, Inc., and operated her own consulting firm for several years.

Sandy's strong ERISA and tax background gives her unique insight into the challenges that clients face. She is proficient in helping clients through both IRS and DOL audits, as well as the IRS correction programs. Sandy works with all types of defined contribution plans, such as 401(k), 403(b), employee stock ownership plans (ESOPs) and profit sharing plans. She provides customized solutions for her clients and uses her extensive knowledge and experience to assist clients with plan design, implementation, communication, compliance, operational effectiveness, and other consulting projects.

PROFESSIONAL DESIGNATIONS

- Certified Public Accountant (CPA)
- Accredited Investment Fiduciary (AIF®)

PRESENTATIONS AND PUBLICATIONS

Sandy is recognized as an industry expert in compliance and retirement and has conducted numerous training seminars on these topics. She has also served as the guest speaker for various professional organizations.

AFFILIATIONS

- Member, AICPA
- Member, ASPPA
- Volunteer, ASPPA Governmental Affairs Committee
- Speaker/facilitator for the Tennessee Society of CPAs
- Speaker – Various ESOP associations
- Member, ESOP Association
- Member, NCEO

EDUCATION

- Accounting, University of Oklahoma
- Accounting, Grand Canyon University

