

# JAMES THOMPSON

CPC, QPA, QKA

Senior DC Plan Management Consultant

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## Current Responsibility

James Thompson is a senior defined contribution plan management consultant with Milliman's Employee Benefits Administration Practice. He joined the firm in 2007.

Member, ASPPA

## Professional Work Experience

The primary goal of James's team is to provide high-quality service to clients and to assure client satisfaction with all of Milliman's services. He views his role as integral to the success of the Milliman/Client relationship, making sure the day-to-day operations of the plan run as smoothly as possible and utilize the many best practices and systems Milliman has in place. James began in the retirement industry in 2007.

James and his team are responsible for providing the following services to their 401(k), profit-sharing, 457, 403(b), Non-qualified, and ESOP clients:

- Daily operations of recordkeeping services
- Day-to-day assistance to the plan sponsor
- Review and reconciliation of participant data
- Reconciliation of plan assets
- Review of benefit distribution packages
- Review of participant loan packages
- Internal escalation for client-specific questions

In addition, James provides consulting services to his clients with respect to plan design and employee communications.

## Professional Designations

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

## Education

BA, Business, Emphasis in Human Resource Management, Bethel University, St. Paul, MN

## Affiliations

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