



Third Party Administration (TPA) Services

Milliman's Defined Contribution TPA services make sure your plan runs smoothly and stays compliant with all relevant plan rules and IRS regulations. Our TPA services help you manage everything from routine tasks to complex responsibilities in your defined contribution program.

Why Milliman TPA Services?



COMPLIANCE CONFIDENCE

Our compliance team handles plan documents to ensure your plan remains compliant, giving you peace of mind.



EXPERT PLAN SUPPORT

Our DC consultants combine deep experience and technical knowledge with our comprehensive analytical tools to optimize your plan. Benefit from expert support and recordkeeping for more efficient and effective operations.



CUSTOMIZED SOLUTIONS

Gain an extension of your team dedicated to delivering tailored solutions. We consider your unique goals, plan, culture, and workforce to meet your specific fiduciary and business needs.

Comprehensive services

- Employer contribution calculations
- Nondiscrimination and compliance testing
- Annual Form 5500 and Form 8955-SSA filings
- Plan and participant-level recordkeeping
- Compliance corrections
- Plan operations and/or compensation review
- Plan design/merger & acquisition projects
- Plan Document and Notice Support
- Regulatory consulting support



To learn more, scan the QR code.

milliman.com/en/products/Small-Business-Retirement-Plan-Solution

To contact an expert, email
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Put the power of Milliman's independent thinking, custom solutions and expert consulting to work for you.

