

Association and Multiple Employer Plan Administration

Our expert consulting, custom solutions and flexible service model set us apart.

Milliman provides seamless, integrated administration, investment advisory, and trustee services for Multiple Employer Plans (MEPs) and Associations with a wide variety of defined contribution plans. Our full-service retirement program gives adopting employers access to features typically only available to large corporate entities. Best of all, Milliman handles the majority of the day-to-day plan administration, alleviating the burden from your HR staff. Milliman partners with select financial advisors and trustees to provide the plan sponsor and adopting employers with fully bundled retirement plan administration. You will have one point of contact and one website that is specific to your company's plan information and activity.

The Milliman Advantage

With Milliman's Association and MEP services, you will receive:

- **Competitive pricing.** Economies of scale boost your purchasing power
- **Fully automated recordkeeping.** Milliman manages majority of administrative responsibilities
- **Robust participant support.** Interactive website and mobile app, call center with helpful representatives
- **Effective participant education.** Ongoing financial education promotes healthy financial outcomes
- **Custom branding.** Participant communication is branded to represent your company, and each adopting employer's materials are customized to that employer's plan

Why Milliman?

Broad Association and MEP expertise

Milliman has unique experience building the service model necessary for association and MEPs to grow and flourish.

Flexible service model

We know that one size does not fit all, which is why we take our time providing a service model that meets your specific requirements.

Expert consulting

Our dedicated, tenured staff will provide you with smart consulting solutions for a result that is thorough, detailed, and comprehensive.

Deep experience

Milliman has been providing services to retirement plans since our founding in 1947. Milliman has provided services to defined contribution plans for over 40 years and has served MEPs and Association plans for more than 25 years.

Focus on growth

A growing MEP is a healthy MEP. That's why we provide tools to help plan sponsors promote your MEP to adopting employers within your organization.

Comprehensive Services

- Recordkeeping
- Administration
- Education
- Consulting
- Compliance
- Investment advisory
- Trust and custody
- Fully bundled services

About Milliman

Milliman is among the world's largest independent providers of benefits administration, actuarial and consulting services. Founded in 1947, the firm includes consulting practices in employee benefits, healthcare, property & casualty insurance, and life insurance and financial services in major cities around the globe.

1,100+
retirement
outsourcing clients

3,000+
actuarial &
consulting clients

\$1 Trillion+
combined assets of
plans we consult on

More than **\$1.2 Billion** in annual
firm revenue



1947
the year we
were founded

65
offices
worldwide

4,000+
company
employees



Top 10
largest pension
administrators in
mid to large market



250+
Best-in-Class Awards
from PLANSPONSOR
Magazine since 2012

32,600+
Association/MEP
participants

\$1.5 Billion combined Association/
MEP assets



978

Participating Employers in Milliman Association/MEPs

For more information

Brad Kuebler
Defined Contribution Association/MEP Practice Leader
(952) 820-2405
brad.kuebler@milliman.com
milliman.com