

# Independent, experienced, flexible



## Taft-Hartley Defined Contribution Services

Milliman has worked with multiemployer funds since 1947. Over the years we have developed a deep and unique understanding of these plans and the challenges they face. Milliman is a founding member of the International Foundation of Employee Benefit Plans, a leading advocacy organization for multiemployer plans, trustees, fund professionals and members. Today, we are one of the largest providers to multiemployer funds in the United States with more than 300 clients.



### FLEXIBLE RECORDKEEPING SERVICES

- Not a one-size-fits-all commodity
- Custom solutions to meet your fiduciary and business needs
- Based on your goals, your plan, your culture, your union



### INDEPENDENT, OBJECTIVE PERSPECTIVE

- Complete investment flexibility
- Unbiased advice with no conflicts of interest
- No retail orientation or monetization of plan data



### STRONGER TOGETHER

- Committed to multiemployer services
- Participant-centric approach
- Open architecture investment platform
- 300+ multiemployer clients
- Privately owned by shareholder employees
- Easy-to-use mobile app and multilingual website
- Full-service U.S.-based Call Center with dedicated multiemployer call center specialists
- Milliman Retirement Income Security Evaluation (RISE™) Score Tool



### MEMBER COMMUNICATION AND EDUCATION

- Award-winning communication practice with dedicated resources
- Multimedia curriculum boosts participation and retirement readiness
- Robust financial education website explains financial concepts in conversational, easy-to-understand language



### COMPLIANCE CONFIDENCE

- Internal Revenue Services (IRS) and Department of Labor (DOL) compliance support
- Comprehensive ADP testing and audit packages
- Regulatory and legislative updates

## Comprehensive Services

- Defined Contribution Recordkeeping & Consulting
- Defined Benefit Consulting
- Health & Welfare Consulting
- Communication and Education

# About Milliman

Growing and committed to employee benefits

<b>1947</b> The year we were founded	<b>67</b> Offices worldwide	<b>4,800+</b> Company employees
<b>1,330+</b> Recordkeeping & admin clients	<b>3,000+</b> Actuarial & consulting clients	<b>300+</b> Multiemployer clients nationally
<b>\$1 Trillion+</b> Combined assets of plans we consult on	<b>\$131 Billion</b> In administration assets	
<b>Top 10</b> Largest pension administrators in mid to large market	<b>150+</b> Best-in-Class Awards from PLANSPONSOR Magazine since 2017	
<b>1,300</b> Annual Multiemployer Pension Funding Study on the funded status of 1,300 plans		
<b>5,000</b> Average Multiemployer DC plan participants	<b>2,000</b> Median Multiemployer DC plan participants	<b>300,000</b> Taft-Hartley DC participants



To learn more, scan the QR code.

[us.milliman.com/en/retirement-and-benefits/multiemployer-plans](https://us.milliman.com/en/retirement-and-benefits/multiemployer-plans)

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