

## Leading provider of Taft-Hartley solutions

Serving our clients to protect the health and financial well-being of people everywhere is at the core of who we are and is central to our mission. We have 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. Known for our unbiased approach, we create custom retirement benefit solutions to meet the needs of Taft-Hartley plan sponsors and their members.

### We're different.

#### Deep experience with multiemployer plans

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. Your relationship manager and team know multiemployer plans and understand the trade.

#### Independent and unbiased perspective

Milliman is not a money manager, insurance provider or mutual fund company. Our main business is providing the best retirement plan recordkeeping services in the industry. We are completely independent and unbiased, with no proprietary investment fund requirements. Our clients can select from virtually an unlimited number of mutual funds, collective trusts or separate account managers, without regard to minimums. There are no conflicts of interest or hidden agendas.

#### Consultative and insightful approach

We offer the best possible consulting and advice for both plan sponsors and participants. Clients receive better diagnosis of issues, broader alternatives to consider and more comprehensive results. Participants know exactly where they are with regard to retirement readiness and what they need to do to achieve success. We structure our services to meet the needs of our clients and not based upon what fits best within our system. Milliman's hallmark is designing flexible, customized solutions tailored to the client's needs.

#### Superior participant experience

Our strategy-based, multi-media experience is designed to engage participants and drive behavior change. Our education is results driven, not focused on selling products or gathering assets. Our goal is to help participants RISE™ above and achieve healthy financial outcomes. Our curriculum is customized at the plan level and personalized for participants, with a powerful yet simple website, a mobile app and full-service Call Center.

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

### Comprehensive Services

- DC consulting
- DC recordkeeping
- Communication and education

# About Milliman

**1,100+**  
recordkeeping &  
admin clients

**3,000+**  
actuarial &  
consulting clients

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

More than **\$1.1 Billion** in annual  
firm revenue



**1947**  
the year we  
were founded

**64**  
offices  
worldwide

**3,900+**  
company  
employees



**1,300**

Annual Multiemployer  
Pension Funding Study  
on the funded status of  
1,300 plans

**Top 10**  
largest pension  
administrators in  
mid to large market



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

**100%**  
Taft-Hartley client  
retention



**300+** Multiemployer  
clients nationally

**\$100 Billion** in administration  
assets



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