

JULIE CANNADAY

CRPC®

Principal and Financial Education Manager

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Current Responsibility

Julie Cannaday is a principal and financial education manager for the Milliman Employee Benefits Administration Practice.

Julie leads the team of retirement educators and on-site representatives that develop and deliver in-person and virtual education seminars, one-on-one consultations, train-the-trainer sessions, focus groups, and video recordings.

The scope of services cover DC, DB, and H&W products. She facilitates executive retirement consultations and develops employee meeting curriculum. Julie measures success through participant behavior changes and is responsible for the integration of human resources and retirement plan education.

Professional Work Experience

Julie's experience includes over 30 years of consulting clients to deliver results-focused wellness education. Her expertise in retirement plans (DC and DB), health, and welfare plans resulted in the sale and delivery of an award winning benefits website to enhance employee wellness education.

Specialties: Communication strategy to maximize employee benefit awareness and appreciation; program design for continuous education; project management; messaging; training; web communications; coordination for large, multi-pronged communications campaigns; specialization in face-to-face communications.

Prior to joining Milliman, Julie was responsible for employee benefits education at Southwest Airlines and SEI. Her vast knowledge of retirement and health and welfare plans allows her to develop comprehensive communication strategies to maximize employee benefit awareness and appreciation. Julie brings great enthusiasm, creativity, and passion to helping participants save and prepare for a successful retirement.

Professional Designations

Chartered Retirement Plan Consultant, CRPC®

Education

BA in Finance, University of Texas at Arlington

Presentations and Publications

- Communication strategies to make lump sum windows more effective.
- Lump sum windows: Engaging communication produces higher response rates.
- The No. 1 question 401(k) participants are asking during the Covid-19 market swings—and how to respond.

Affiliations

- International Association of Business Communicators
- Worldwide Employee Benefits Network