

JEFF MARZINSKY

Principal & Employee Benefits Consultant

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Current Responsibility

Jeff Marzinsky is a principal and investment consultant with Milliman's Albany, New York office. He joined the firm in 1994.

Professional Work Experience

Jeff is responsible for providing investment advisory and retirement plan consulting services to Milliman's clients. This includes:

- Working with retirement committees to develop fiduciary procedures, controls, and investment policy
- Designing investment menus, modeling portfolios, and developing glidepaths
- Developing asset allocation and liability driven investment strategies
- Conducting investment manager searches, performance monitoring, and due diligence
- Conducting platform and vendor searches
- Performing investment manager and advisor reviews
- Developing and managing portfolios
- Consulting in plan design and compliance

Jeff also works on the design and implementation of new systems. He has developed systems for investment performance analysis, pension plan duration analysis and liability matching, client management, and compliance testing.

Jeff serves on and has chaired several internal Milliman committees, including the Investment Strategic Planning Group, the Defined Contribution Strategic Planning Group, the Capital Markets Committee, the Technology Committee, and the Milliman Employee Education Team. He has also served on external not-for-profit investment committees.

Professional Designations

- Certified Investment Management Analyst (CIMA®)
- Certified Pension Consultant (CPC)
- Accredited Pension Administrator (APA)
- Chartered Mutual Fund Counselor (CMFC)

- Certified Business Manager (CBM)
- FINRA Series 7, 63, and 65
- Microsoft Certified Database Administrator (MCDBA)
- Microsoft Certified Professional (MCP)
- Master Microsoft Office User Specialist (MOUS)

Education

BS, Finance, Siena College

Presentations and Publications

Jeff is a frequent speaker at client and professional seminars. He has authored several articles and white papers, including:

- Is the coronavirus market drop the worst in DJIA history? Yes. And no.
- Developing an alpha beta pension plan portfolio
- Developing pension plan investment strategy: A variety of considerations
- Pension plan investment returns: Some thoughts and observations
- Considerations in choosing a target date fund
- Fiduciary compliance reviews
- I think I'm a fiduciary
- 401(k) plan sponsors: More disclosures to help you meet your fiduciary responsibilities
- Hidden costs: Are 401(k) fees taking a bite out of retirement savings?
- A 401(k) plan that works—The “bundled unbundled” solution

He has also been quoted by the New York Times, Workforce, Money Management Letter, and GAO.