

DAVID SIMON

QKA, QPA, CPC

Principal and Relationship Manager

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Current Responsibility

David Simon is a principal and relationship manager in the Milliman Defined Benefit Administration Practice. He joined the firm in 2002. His primary responsibilities ensure that our clients are happy with all aspects of Milliman's benefit administration services for their plans. David started in the retirement industry in 1999.

Professional Work Experience

David has worked with a wide range of defined benefit pension plans, traditional, pension-equity, public, cash balance, and non-qualified plans. He has extensive experience managing various teams and client relationships, including project management, operations management, and client relationship management. David is familiar with pension de-risking projects such as lump-sum windows, annuity purchase projects, and lost participant searches. He also has expertise in plan design change projects, mergers and acquisitions, plan trustee changes, large-scale data clean-up projects, workforce reduction (early retirement window) projects, and retirement choice projects.

Prior to David's current role, he managed implementation teams through a wide range of defined benefit pension plan conversions, from traditional to cash balance to non-qualified plan designs. He has managed plan updates for a wide array of projects, such as lump-sum windows, plan enhancements, legislative updates, and plan amendments. He has also contributed to the development of administration systems by providing his guidance for system planning and upgrades. Before joining Milliman, David worked on defined contribution plans for a major consulting firm.

Professional Designations

- Certified Pension Consultant (CPC), the American Society of Pension Professionals and Actuaries (ASPPA)
- Qualified Pension Administrator (QPA), ASPPA
- Qualified 401(k) Administrator (QKA), ASPPA

Education

B.A., Business Administration, Operations Management, University of Massachusetts at Amherst