

Defined Contribution Outsourcing

Our independent perspective, custom solutions and superior participant experience set us apart.

Milliman is a different kind of retirement plan administrator in that we approach our clients from the perspective of an independent consultant, without the corporate agenda of money managers or financial services companies. We are not an insurance company, a mutual fund company or a bank, and we do not offer administration services in order to get the plan assets.

We are defined contribution plan experts committed to helping you create and manage a plan that attracts and retains employees, helping them to achieve healthy financial outcomes. Our mission? To serve our clients to protect the health and financial well-being of people everywhere.

Why Milliman?

Independent, objective perspective

Our consulting advice and our pricing are free and clear of conflict and always have been. Milliman maintains complete independence from mutual fund companies and investment managers, allowing us to act solely on behalf of you and your employees.

Custom solutions

DC Outsourcing at Milliman is not a one-size-fits-all commodity. We consider the uniqueness of your goals, your plan, your culture, your workforce and provide customized solutions to meet your specific fiduciary and business needs.

History of excellence

We bring you best practices, deep benefits knowledge and technical expertise built on our work with thousands of organizations and plans since our founding in 1947. That means you will receive a better analysis of issues, broader alternatives to consider, and more comprehensive results.

Optimized plan designs

Our DC consultants are critical thinkers and problem solvers, who meld their deep experience and technical knowledge with our comprehensive analytical tools to optimize your plan design.

Compliance confidence

Our compliance team handles plan documents (prototype or volume submitter), amendments, IRS submissions, comprehensive audit packages and discrimination testing, so you can be confident that your plan is compliant.

Complete investment flexibility

We have no proprietary investment fund requirements. Our flexible investment platform allows you to select from virtually an unlimited number of mutual funds, collective trusts or separate account managers without regard to minimums.

Measurable results

Our robust tools and methodologies make a measurable difference in retirement outcomes. They give you the power to know exactly how your plan is performing with regard to results, competitiveness, cost efficiency, fiduciary responsibilities, administration quality and fees.

Streamlined administration

We use advanced technologies, consolidate data into a single source, and streamline administrative processes to lower your overall plan administration expenses. Another plus? We remove the administrative burden so you can focus on running your business.

Comprehensive Services

- Administration
- Recordkeeping
- Education
- Consulting
- Compliance
- 401(k), 403(b), 457
- Money purchase & profit-sharing
- Taft-Hartley
- ESOPs
- Non-qualified plans

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

Keeping Participants in the Know

Our multimedia participant experience is designed to educate, inspire and change behavior. The curriculum is customized at the plan level and personalized at the participant level, and includes a powerful yet simple participant website, transactional mobile app and full-service Benefits Service Center.

Milliman's retirement education promotes healthy financial outcomes, with an emphasis on being ready for retirement. The curriculum:

- Simplifies difficult or intimidating financial information.
- Targets varying levels of retirement knowledge.
- Uses a variety of media to appeal to generational and learning-style preferences (emails, articles, videos and live webinars with Q&A).

FEATURED TOPICS

- Save Now: Start Somewhere
- Planning for the Big Stuff (retirement, college, etc.)
- Keeping Your Account Secure
- Mix It Up: Risk Management
- Retirement: Ready or Not?

QUARTERLY WEBINARS

- Effective Saving Habits
- Social Security & You
- HSAs & 401(k)s
- ABCs of Retirement Investing



Milliman Has an App For That

Stay up to date with your retirement savings plan. Download the Milliman Mobile Benefits app from the App Store or Google Play.



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