

Richard Levesque

QKA, QPA, CPC
Employee Benefits Consultant



CURRENT RESPONSIBILITY

Richard is a consultant and manager in the Compliance and Recordkeeping Services Department in the Albany, New York, office of Milliman. He has more than 15 years of experience in the benefit administration and design of qualified plans.

EXPERIENCE

Richard is responsible for administering plans in the Northeast Regional Processing Center. He provides the following services to 401(k), 403(b), profit-sharing, and nonqualified deferred compensation plans:

- Daily valuation and plan recordkeeping
- Plan design and client consulting
- Annual compliance and nondiscrimination testing
- Employee education materials and seminars
- Overall plan administration and client service
- Plan design, submissions, and amendments
- Government forms preparation, filing, and auditor assistance

In addition, Richard provides consulting services to his clients with respect to plan design and employee communications.

As a manager, Richard is responsible for directing and reviewing the work flow for members of his team. He also provides training to new and existing employees.

PROFESSIONAL DESIGNATIONS

- Certified Pension Consultant (CPC)
- Qualified Pension Administrator (QPA)
- Qualified 401(k) Administrator (QKA)

AFFILIATIONS

- Member, American Society of Pension Professionals and Actuaries (ASPPA)

EDUCATION

- Attended Siena College, Major in Finance
- AAS, Accounting, Hudson Valley Community College

