

Jon Lloyd

ERPA, QPA, QKA
Senior Benefits Consultant



CURRENT RESPONSIBILITY

Jon Lloyd is a principal and senior DC compliance consultant for the Milliman Employee Benefits Administration practice. He joined the firm in 2007.

EXPERIENCE

Jon's responsibilities include managing a team of compliance consultants that complete the annual nondiscrimination work, consult on plan compliance, assist and complete governmental filings, work with independent auditors, and consult on plan design and issue resolution.

Jon has extensive 401(k), 457 and 403(b) experience and is very knowledgeable on the processes and procedures necessary for successful transferring of assets from various 403(b) product providers, as well as working with frozen annuity assets at legacy providers.

Previously, Jon was a regional pension consultant for Standard Insurance Company. In this role, he was responsible for providing consulting services to current clients on fund reviews, plan design, and ERISA compliance. His client assignments included the State of Texas, Oklahoma, and Arkansas. He also served as Standard's large case research development team lead.

PROFESSIONAL DESIGNATIONS

- Enrolled Retirement Plan Agent (ERPA), Internal Revenue Service
- Qualified Pension Administrator (QPA), American Society of Pension Professionals and Actuaries (ASPPA)
- Qualified 401(k) Administrator (QKA), American Society of Pension Professionals and Actuaries (ASPPA)

EDUCATION

BS, Portland State University

