

Charles Hodge

CIMA

Principal and Investment Consultant



CURRENT RESPONSIBILITY

Charles Hodge is a principal and investment consultant for the Milliman Southern Employee Benefits Practice (SEB) in the Dallas office. He joined the firm in 2000.

EXPERIENCE

Charles has worked with investments for more than 20 years and has been an institutional investment consultant since 1991. He helps defined benefit, defined contribution, endowment, and foundation clients find investment solutions with the following expertise:

- Investment manager selection and monitoring
- Investment policy statement design and review
- Asset liability modeling
- Funding study analysis
- Asset allocation studies
- Model portfolio construction
- Vendor searches

Prior to joining Milliman, Charles worked at Arthur Andersen, serving the defined contribution and defined benefits plans of mid-sized and Global Fortune 500 companies. Charles also served as President and Senior Investment Consultant for Robert Harrell, Inc., an investment consulting firm working with mid-sized and large pension and foundation clients.

PROFESSIONAL DESIGNATIONS

- Certified Investment Management Analyst (CIMA)
- CEBS Recognition of Academic Achievement—Retirement Plans
- FINRA and SEC Licenses: Series 6, 7, 63, 65

AFFILIATIONS

- Member, CFA Institute
- Member, Investment Management Consultants Association
- Member, CFA Society of Dallas-Ft. Worth

EDUCATION

BA, Economics, University of Texas at Austin

