

### Thomas R. Mathews

CPA  
Principal, Practice Leader



#### CURRENT RESPONSIBILITY

Tom has been in the retirement industry for 17 years and is responsible for the delivery of services to more than 60 clients. He currently serves as co-practice leader in Milliman's Walnut Creek, Calif., office.

Before joining Milliman, Tom spent 11 years with a large public accounting firm, where he specialized in auditing public and private companies in the retail, financial, and real estate industries.

#### EXPERIENCE

Tom works closely with clients of all sizes in the design, installation, and administration of their qualified retirement plans, including profit-sharing plans, money purchase pension plans, 401(k) profit-sharing plans and defined benefit pension plans.

His clients range in size from five to 2,500 participants, including approximately 40 clients with daily-valued 401(k) plans. He works with clients in a variety of industries, including law firms, high technology, retail, manufacturing, consulting, transportation, and not-for-profits.

#### PROFESSIONAL ACTIVITIES

Tom has authored numerous newsletters and publications on current developments in the retirement plan industry. He is also a frequent speaker at seminars on qualified plans and related issues.

#### PROFESSIONAL DESIGNATIONS

- Certified Public Accountant, state of California
- Member, California Society of Certified Public Accountants
- Member, American Society of Certified Public Accountants
- Member, Western Pension & Benefits Conference
- Member, American Society of Pension Professionals and Actuaries

#### EDUCATION

BS (honors), Business Administration with emphasis in Accounting, California State University, Hayward

