

Randy Mitchell

CIMA
Principal



CURRENT RESPONSIBILITY

Randy Mitchell is a principal and serves as the Investment Services Practice Leader for the Milliman Southern Employee Benefits Practice (SEB) in the Dallas office. He joined the firm in 1992.

EXPERIENCE

Randy's technical experience includes assessing investment management risk, analyzing and reporting investment results, along with conducting investment manager search and selection engagements. He services Milliman's clients in the following ways:

- Assisting clients in meeting their fiduciary responsibilities regarding investments
- Explaining the investment process (selection of investment options) and the asset allocation process (classes vs. individual securities)
- Assisting in the development of an investment policy statement
- Measuring and reporting investment performance and periodically reviewing each client's investment options
- Defining investment manager performance measurement criteria
- Conducting client investment performance reviews
- Developing asset allocation strategies for participant-directed plans
- Developing asset allocation strategies for defined benefit plans

Prior to joining Milliman, Randy was with Fidelity Investments.

PROFESSIONAL DESIGNATIONS

- Certified Investment Management Analyst (CIMA)
- Registered Investment Advisor
- FINRA Series 65: Registered Investment Advisor Exam
- FINRA Series 63: Uniform Securities Agent State Law Exam

AFFILIATIONS

- Member, Society of Professional Administrators and Recordkeepers
- Member, Investments and Wealth Institute

EDUCATION

BBA, Finance, University of Texas at Arlington

