Milliman Bio

Jeffrey T. Marzinsky

CIMA®, CPC, CMFC, APA, MCDBA
Principal, Employee Benefits Consultant

CURRENT RESPONSIBILITY

Jeff is a principal and investment consultant with Milliman's Albany, New York office. He joined the firm in 1994.

EXPERIENCE

Jeff is responsible for providing investment advisory and retirement plan consulting services to Milliman's clients. This includes:

- Working with retirement committees to develop fiduciary procedures, controls, and investment policy
- Investment menu design, model portfolio, and glidepath development
- Asset allocation and liability driven investment strategy development
- Investment manager searches, performance monitoring, and due diligence
- Platform and vendor searches
- Portfolio development and management
- Plan design and compliance consulting

Jeff also works on the design and implementation of new systems. He has developed systems for investment performance analysis, pension plan duration analysis and liabiltity matching, client management, and compliance testing.

Jeff serves on and has chaired several internal Milliman committees, including the Investment Strategic Planning Group, the Defined Contribution Strategic Planning Group, the Capital Markets Committee, the Technology Committee, the Milliman Employee Education Team. He has also served on external not-for-profit investment committees.

PRESENTATIONS AND PUBLICATIONS

Jeff is a frequent speaker at client and professional seminars. He has authoried several articles and white papers, including:

- Developing an alpha beta pension plan portfolio
- Developing pension plan investment strategy: A variety of considerations
- Pension plan investment returns: Some thoughts and observations
- Considerations in choosing a target date fund
- Fiduciary compliance reviews
- I think I'm a fiduciary
- 401(k) plan sponsors: More disclosures to help you meet your fiduciary responsibilities
- Hidden costs: Are 401(k) fees taking a bite out of retirement savings?
- A 401(k) plan that works–The "bundled unbundled" solution

He has also been quoted by the New York Times, Workforce, Money Management Letter, and GAO.

PROFESSIONAL DESIGNATIONS

- Certified Investment Management Analyst (CIMA®)
- Certified Pension Consultant (CPC)
- Accredited Pension Administrator (APA)
- Chartered Mutual Fund Counselor (CMFC)
- Certified Business Manager (CBM)
- FINRA Series 7, 63, and 65
- Microsoft Certified Database Administrator (MCDBA)
- Microsoft Certified Professional (MCP)
- Master Microsoft Office User Specialist (MOUS)

EDUCATION

BS, Finance, Siena College

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