TOM SWAIN, FSA, EA, FCA, MAAA

Principal

With more than 30 years of experience working with employee benefits, Tom has consulted in the design, funding, administration, and fiduciary and regulatory compliance of defined benefit, defined contribution, and nonqualified deferred compensation plans. He has an in-depth understanding of the complex rules and regulations inherent in qualified retirement plans. Tom is the managing consultant for several of the firm's largest clients. His clients comprise a variety of employers, including governmental entities, not-for-profit, and private and publicly-traded employers with international operations. He also has expertise in mergers and acquisitions, having supported clients in over 100 M&A transactions.

Areas of Expertise

Marketing Strategy

Defined Benefit

Actuarial Consulting

Plan Compliance

Retirement Consulting

Pension Plans

Nonqualified Deferred Compensation Plans

Plan Administration

Forecasting

De-Risking Strategy and Implementation

Plan Terminations

Merger / Acquisitions / Divestiture Consulting

Government Plans

Risk Management

Cash Balance Plans

Education

University of North Carolina, Chapel Hill, NC — BS, Mathematics

What's Your Passion?

Being with family and friends and having a golf club in my hands, ideally at the same time! I'm a lifelong learner; my early mornings and late evenings are spent reading something new.

Publications and Presentations

- *Evolution (or Revolution) in Total Rewards*, Speaker, Conference of Consulting Actuaries Annual Meeting, 2017
- *How to Properly De-Risk Your Plan*, webinar, 2017
- *Accounting for the OPEB Obligation*, Speaker - Alabama Government Finance Officer Association, 2016
- *Life After Deductions*, webinar, 2016
- *Delegating and Managing Fiduciary Roles*, webinar, 2016
- *Audit Survival Tips for Retirement Plans*, Developments, 2015
- *The Aging of America*, webinar, 2015
- *Audit Survival Tips for Retirement Plans*, Developments, 2015
- *Is it Time to Transfer Risk? A Strategic Framework*, Speaker - Philadelphia Client Forum, 2014

Professional and Community Involvement

- American Academy of Actuaries
- Conference of Consulting Actuaries (former Board & Executive Committee Member, Member of Annual Meeting Committee)
- Phi Beta Kappa

Contact Me

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