

JOSH WINTER

QPA, QKC, QKA, CPC

Relationship Manager, Taft-Hartley Practice

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Current Responsibility

Josh Winter is a DC relationship manager with Milliman's Employee Benefits Administration Taft-Hartley Defined Contribution Practice. He joined the firm and the retirement industry in 2015.

Professional Work Experience

Based in Minnesota, Josh began his working career in the retirement industry in 2015 and has worked with Taft-Hartley clients since the beginning. He began servicing clients in the plan manager role at Milliman. This involved overseeing the day-to-day administration of the plan. Josh has since transitioned to the relationship management role. Starting in the plan manager role has allowed him to develop a thorough understanding of the back-end administration that goes into running plans day-to-day. Josh is currently responsible for consulting with plan sponsors and professionals on plan design, administration, compliance testing, government reporting, and regulatory changes of Milliman's Taft-Hartley clients.

Professional Designations

- Qualified Pension Administrator (QPA), American Society of Pension Professionals and Actuaries (ASPPA)
- Qualified 401(k) Consultant (QKC), ASPPA
- Qualified 401(k) Administrator (QKA), ASPPA
- Certified Pension Consultant (CPC), ASPPA

Affiliations

- Member, ASPPA
- Member, International Foundation of Employee Benefit Plans

Education

N/A