



TOM SWAIN, FSA, EA, FCA, MAAA

Principal

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

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 been a principal of the firm since 1987, and is BPS&M's marketing director and a member of the management committee.

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.

Education

University of North Carolina, Chapel Hill, NC — B.S., Mathematics

Publications and Presentations

- *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 Program Committee)
- Phi Beta Kappa

Contact Me

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