

**PROFESSIONAL EXPERIENCE**

**HAWAII5500 LLC**

**Owner & President, Retirement and Welfare Plan Services**

*Kalihi and Kahalu'u, Hawaii; 2017-present*

Manage, consult on and administer compliance and IRS filing needs of employer sponsored retirement and welfare plans.

Responsibilities include consulting, management, administration, compliance, quality control, budgeting, marketing, sales, contracts.

A dynamic and demanding field which encompasses critical thinking and problem solving to work within the limits of government compliance, financial demands of the client, and provisions of the plan document. Requires strong attention to detail and high sensitivity to confidential data.

**HAWAII CLIENT SERVICES, a subsidiary of HAWAII DENTAL SERVICE**

**Vice President, Retirement and Welfare Plan Services**

*Honolulu, Hawaii; 2011-2017*

Created a retirement and welfare plan services practice.

**ACTUARIAL CONSULTANTS INC.**

**Consulting Administrator**

*Kaneohe, Hawaii; 2010-2011*

Established and managed California-based company's first satellite practice.

**AON CONSULTING/KPMG LLP**

**Senior Consultant**

*Honolulu, Hawaii; 1994-1999, 2001-2009*

Consultant focused on compliance, administration of retirement plans.

**PROFESSIONAL CREDENTIALS**

**INTERNAL REVENUE SERVICE**

Enrolled Retirement Plan Agent (ERPA)

**AMERICAN SOCIETY OF PENSION PROFESSIONALS & ACTUARIES**

Certified Pension Consultant (CPC), Qualified Pension Administrator (QPA), Qualified 401(k) Administrator (QKA)

**NATIONAL ASSOCIATION OF PLAN ADVISORS**

Certified Plan Fiduciary Adviser (CPFA)

**EDUCATION**

**UNIVERSITY OF HAWAII AT MANOA**

**M.A. Geography; Honolulu, Hawaii;**

Thesis: User Interaction, 3D Terrain and Rotation in a Dynamic Cartographic Viewing Environment

**Certificate of Indo-Pacific Languages in Indonesian Language; May 1997**

**UNIVERSITY OF CALIFORNIA AT BERKELEY**

**B.A. Applied Mathematics, French Language & Literature; Berkeley, California;**

**COMMUNITY INVOLVEMENT**

**KANEOHE BUSINESS GROUP**

Member, Board of Directors since 2018

**KANEOHE ELEMENTARY SCHOOL**

Member of Health and Wellness Committee since 2015

**TOASTMASTERS**

Member at various times of the following clubs: dba Toastmasters, Patsy T. Mink Center for Business & Leadership Toastmasters, Kaneohe Bay Toastmasters; 1994-2019

**YMCA OF HONOLULU**

Member of informal Nu'uaniu YMCA Membership Advisory Committee as parent representative of Hula Hui o Kapunahala o Nu'uaniu YMCA

**EQUALITY HAWAII**

Board Member, 2011-2013