Patrick Osei

Consulting Actuary

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SUMMARY

Consulting actuary, FSA and Enrolled Actuary with 8 years in retirement consulting, leading pension valuation and plan design work for 15 corporate and public sector clients. Delivers ASC 715 accounting, funding projections and asset-liability studies, and explains them plainly to CFOs and plan committees.

SKILLS

- **Pension Valuation**
- **ASC 715**
- **Funding Projections**
- **Asset-Liability Studies**
- **Plan Design**
- **ProVal**
- **Python**
- **Excel**
- **VBA**
- **Communication**

EXPERIENCE

Consulting Actuary

04/2022 - Present

Buckhead Retirement Advisors

Atlanta, GA

Retirement plan consulting firm.

- Lead pension valuation work for **15** defined benefit plans with $6.5B in combined assets.
- Prepare ASC 715 disclosures and funding projections each year, meeting every client audit deadline.
- Run asset-liability studies for 4 plans, supporting de-risking moves that cut funded status volatility 30%.
- Advise 3 sponsors on plan design and pension risk transfer, including a $400M annuity purchase.

Actuarial Analyst

06/2018 - 03/2022

Ponce Benefits Consulting

Atlanta, GA

Benefits consultancy; promoted to actuarial consultant in 2020.

- Valued 25 plans in ProVal and reconciled participant data for 80,000 members.
- Wrote Python and VBA tools that automated Excel benefit calculations, saving 300 hours a year.
- Drafted 40 client letters and valuation reports for the signing actuary.

EDUCATION

Bachelor of Science

Emory University

Mathematics

Atlanta, GA

05/2018

CERTIFICATES

Fellow of the Society of Actuaries (FSA) 2022

Society of Actuaries

Enrolled Actuary (EA) 2021

Joint Board for the Enrollment of Actuaries