Alex G. Kuhel, ASA, EA, MSPA

Consulting Actuary
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CLARITY IN NUMBERS, LLC
Actuaries | Consultants

Summary of Experience

As a Consulting Actuary for Clarity in Numbers, LLC, Alex helps employers derive optimal retirement plan solutions for their organizations. He has 15 years of experience providing actuarial valuation and consulting services for clients of all sizes, from sole proprietorships to multi-national corporations with thousands of employees.

Alex assists private sector employers with the implementation and administration of their retirement programs: plan document setup, actuarial valuations of pension plans, benefit calculations and benefit statements; plan design studies; non-discrimination testing for tax-qualified retirement programs (pension and 401(k) profit-sharing); financial statement accounting for qualified pensions under U.S. GAAP Accounting Standards Codification (ASC) 715/960.

Alex designs employer-provided retirement programs including: Tiered Defined Benefit Pension Plans, Cash Balance Plans (including conversion post-Pension Protection Act), New Comparability Profit Sharing Plans, Pension Equity Plans, and various DB/DC companion plan arrangements.

Alex consults with clients on the short and long term effects of plan design changes and funding strategies, and helps demystify pension programs for business owners. He also works with their CPAs, brokers, attorneys and existing plan administrators to coordinate action items. Furthermore, Alex guides clients in the event of a plan freeze or plan termination.

Prior to joining Clarity in Numbers, LLC, Alex managed large caseloads at Summit Benefit and Actuarial Services, and was Lead Actuary for JPMorgan's "OurMax" clients; both involving heavy work for smaller employers with complex plan designs. He has also been a key consulting actuary for Towers Perrin, where he worked with large organizations on a wide range of retirement plan issues. Alex also spent two years running the company operations for APA Plan Administration, a 401(k) administrator based in Arizona.

Professional Affiliations

- Associate of the Society of Actuaries (ASA, 2000)
- Enrolled Actuary under ERISA (EA, 2005)
- Member of the American Society of Pension Professionals and Actuaries (MSPA, 2009)
- Member of the ASPPA College of Pension Actuaries (ACOPA, 2007)

Education

BS, Actuarial Sciences; University of Iowa, Business concentration

Community Service

- Presented Lorman Education, Retirement Plans, Tucson, AZ, 2002
- Presented Lorman Education, Form 5500 filings, Tucson, AZ, 2003
- Presented Summit Benefit Seminar, Milwaukee, WI, 2007-2009 (five occasions)