



As one of the nation's largest actuarial firms, Conrad Siegel Actuaries combines technical expertise with creative consulting to help you navigate the ever-changing world of employee benefits.

# Maximizing the Value of Employee Benefits Programs

## A Tradition of Excellence

Over 40 years ago, Connie Siegel saw a need to provide clients with excellent, independent and professional actuarial and employee benefits consulting and administrative services. His pioneering and visionary approach set in motion a company that has grown into one of the largest and most respected employee benefits firms in Pennsylvania, continually serving over 1,200 clients.

"Everything we do and every service we provide is supported by our four pillars of excellence—actuarial expertise, unmatched precision, independent thinking and a nearly half century of experience," says Bob Dolan, President and CEO. "These four qualities have helped thousands of businesses throughout Pennsylvania to maximize the value of their employee benefits programs," says Dolan.

## An Actuarial Approach

"Actuaries are experts at providing information and analysis to help companies predict or maintain the financial soundness of their long-term employee benefit commitments," says Dave Stirling, a consulting actuary and partner in **Conrad Siegel Actuaries**. Our ability to break down and analyze highly complex situations and communicate these issues in a clear and concise way allows our clients to make informed and accurate decisions regarding their employee benefits plans. "This has proven especially critical," says Kevin Erb, a health actuary and partner in **Conrad Siegel Actuaries**, "in the work we do to help our clients control their health care costs."

## Independence: The Hallmark of Conrad Siegel Actuaries

In order to make sound employee benefit decisions employees need the assurance of complete independence.

"We believe the value of independence lies in the trust that exists between our consultants and their clients," says Tara L. Mashack-Behney, Director of Investment consulting for **Conrad Siegel Investment Advisors, Inc.**, "trust based on the certainty of timely information, factual reports, expert analysis, and most importantly, objective advice based on our value added passive investment philosophy." We work hard to continually earn the trust and confidence of our clients by fully disclosing our compensation and not selling insurance products or investments.

## The Employee Benefits Company

While our early consulting focus centered on retirement plan consulting, over the years our services expanded to meet the evolving needs of our clients and changes in government regulations. Today, our comprehensive services include administrative and actuarial consulting services for all types of retirement plans, health and welfare plans, workers' compensation, expert testimony, mergers and acquisitions, as well as investment advisory services for retirement plans—virtually every practice area related to employee benefits.

"A key element of our success over the years has been our organizational structure," says Bob Dolan. We are owned and managed by the consultants who work with and are directly responsible for their clients.

While we have grown and achieved many successes, our original commitment to excellence has never changed. We will continue to use our expertise, precision, independence, and experience in the best interests and welfare of our clients. By doing so, we are one source, one solution for all our clients' needs.

## Conrad Siegel Actuaries

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Mission: Provide excellent, independent, professional actuarial consulting, employee benefit consulting, and employee benefit administration services for our clients.

Employees: 90  
Top Executive: Robert J. Dolan, A.S.A., President and CEO  
Product/Service: Actuarial, employee benefits, investment consulting and administrative services  
Year Founded: 1963

