

QUICK LOOK

FOUNDED IN 2009

COUNTRY: UNITED STATES

NAMED TOP 4 CASH BALANCE PLAN ADMINISTRATORS
FOR 2015 AND 2016 BY PLANSPONSOR MAGAZINE

OVER \$5.5 BILLION ASSETS UNDER ADMINISTRATION



About October Three Consulting

Established in 2009, October Three is the leading independent actuarial firm in the United States. With offices located in Chicago, New York, Los Angeles, San Francisco, Dallas, Boston, Denver, and Jacksonville we provide actuarial consulting, plan administration, and employee communication services, among others, to a wide spectrum of business and governmental clients.

October Three was built around a refreshingly different approach to Defined Benefit (DB) plans. In an industry mired in confusion and overall skepticism, we saw an opportunity to create clarity and to build a new understanding about where the industry is headed and how an organization's DB plan can evolve to deliver more.

How we do that is two-fold. First, we design solutions that fit both the urgent needs of today and the impending needs of the future. And we do so with openness and full transparency, granting customers a refreshing level of insight into their plans.

We know how to share our expertise in a way that's easily understood. We're experts in what we do. But we don't show off what we know. Instead, we're about communicating in a way that delivers clarity and garners long-term trust.

At the end of the day, we believe in treating our clients fairly and with respect. And we believe that by shedding light on alternative solutions in the DB arena, we can help our clients move from a sense of powerlessness and negativity to one of empowerment.

"We design retirement programs that mitigate risks, manage costs and deliver results. And, we're proud to be pioneering new, creative solutions for defined benefit plans."

JEFF STEVENSON
President & CEO

"I am still amazed at how much October Three knew about my plan, before they even got our data. Their Pension Forensics tool is truly revolutionary. They really care about helping us manage our plans and provide innovative solutions with our best interest in mind. We feel like we have a partner, not just a vendor."

CFO at large multinational company

