

Client Name

Contact information

Summary of Qualifications

As the Senior Director of Global Benefits who is certified as an employee benefits specialist, I design and administer a comprehensive suite of cost-effective benefit plans that attract executive and non-management talent. These plans include health and wellness, retirement accounts, and executive deferred compensation, with a strong focus on driving wellness initiatives. Working within a global environment, I ensure compliance with both U.S. regulations as well as the EU's GDPR. My strength is in managing large, complex M&A events where aligning benefit plans with those of former employers is critical to employee retention.

Career Highlights

- Successfully completed large-scale 401k plan mergers & terminations following corporate actions
- Formed global wellness council that meets monthly to implement global wellness initiatives such as *Be Well Day* – an annual event focused on wellness & strategize for future programs
- Led successful transition of Health & Welfare benefits into 2 distinct companies during an acquisition & re-creating identical benefits for 7K employees from both entities
- Addressed compliance issue over an acquisition that incurred >\$1M in penalties due to errors in Form 1095 reporting, working with external legal counsel to waive penalty
- Conducted cost/benefit analyses to assess financial impact of moving acquired companies' employees to Wyndham's benefits programs

Professional Experience

Employer

2018 - present

Senior Director, Benefits & Well-being

- Design cost-effective health and welfare, retirement, well-being & executive benefits programs
- Administer 401(k) plans (3 traditional & 2 non-qualified) to manage funding, compliance, & financial reporting
- Oversee \$60M budget for health & welfare, as well as retirement plans
- Supervise administrative compliance across Canada, Latin America & Europe
- Manage benefit programs during mergers & acquisitions - from due diligence to integration - to ensure accuracy & regulatory compliance
- Benchmark benefit programs against peer organizations to maintain competitive advantage
- Submit Form 5500 to IRS
- Support external audits to ensure regulatory compliance with COBRA, SOX, HIPPA, ERISA, as well as federal & state statutes & GDPR for European employees
- Prepare materials for quarterly Employee Benefit Commitment
- Conduct annual reviews of medical plans to assess other options, including value-based care, virtual care, & condition-specific solutions

Employer

2006 - 2018

Senior Director Benefits

(promoted 5 times to positions of increasing scope & responsibility)

- Managed \$220M budget for global health & welfare
- Administered health and welfare & global well-being programs for 45K employees
- Advised senior leadership during acquisitions to ensure seamless transitions of benefit plans
- Managed vendor relationships inclusive of 35 external partners
- Directed Call Center responses regarding plan administration

- Administered Leaves of Absence, FMLA & ADA leaves for U.S.-based employees

Employer

2001 - 2006

Human Resources Generalist

- Managed FMLA & LOA process throughout 15 states
- Administered healthcare benefits & 401(k)s, including enrollment period communications

Software

MS Office: Word, Excel; Powerpoint; Oracle; ADP; Sharepoint; Smartsheet

Certification

Certified Employee Benefit Specialist (International Foundation of Employee Benefits)