Biography

Brian J. O’Neill

Brian O’Neill has over 20 years of extensive qualified benefit plan experience. His background includes both defined benefit and defined contribution plan expertise. He has extensive experience in conducting compliance reviews of retirement plans for compliance with ERISA and tax requirements, including plan and trust requirements, participant loan provisions, 404(c) compliance, payment of plan administrative expenses with plan assets, and reporting and disclosure requirements. He also specializes in the analysis of defined contribution plan fees and expenses to assist plan fiduciaries in understanding the true costs of operating their plans.

Brian works with Private Investment Funds including hedge funds with respect to ERISA compliance issues. Specifically, he helps fund administrators establish the proper testing procedures for determining whether the assets of the fund are ERISA plan assets. He also assists administrators in developing the proper documentation to comply with any applicable class exemptions.

Brian assists clients with the implementation of their benefits administration strategies by providing both vendor and data management expertise. His areas of proficiency include plan documentation, requirements analysis, detailed logic specifications, and testing and validation of plan requirements.

Prior to establishing Bartlett O'Neill Consulting, Inc., Brian was a Vice President at Clark Consulting, where he was a member of the Employee Benefits Consulting group. Prior to Clark Consulting, Brian was a Senior Manager with Arthur Andersen, where he was a member of the firm’s Benefits Administration Strategy and Technologies sub-service line. He has directed engagements focusing on data and process flow optimization; functional design and business process re-engineering; data management, including clean-up, conversion, and on-going migration; and in-sourcing/outsourcing analysis. Brian also assists clients in the search and selection of vendor services. To that end, he conducts current environment analysis and vendor pre-screenings; develops requests for proposals and evaluates vendor responses; and conducts vendor site assessments that enable effective finalist selections.

Brian holds a Bachelor of Science in Mathematics from Mount Saint Mary’s College. He is a member of the National Center for Employee Ownership, Profit Sharing / 401k Council of America, and the American Society of Pension Professionals and Actuaries (ASPPA).