

5104 Portmarnock Court
Austin, TX 78747-1466

Tel: (512) 291-9400
JimBushnell@Austin.RR.com

CAREER OBJECTIVE

To provide senior level employee benefit consulting, management advisory and administrative services to "C" level leaders and managers of organizations regarding the design, administration, funding and communication of high quality, cost effective and administratively efficient employee benefit programs and systems. In summary, be a strategic partner that will impact and help execute the organization's overall business, human resource and compensation strategy.

SKILLS SUMMARY

Seasoned employee benefits consultant / producer recognized for the ability to netweave and develop new business, in a consultative sales process, as well as manage and lead a team of co-workers to effectively deliver high quality and cost effective creative solutions and services to internal and external clients and maintain long lasting client relations. Extensive employee benefits knowledge and "hands on" practical experience includes, but is not limited to the following:

- **Health and Welfare** - life, disability, long term care, medical, dental, vision {indemnity to managed care (HMO, PPO, POS,) as well as Consumer Driven Health Plans with HRAs, HSAs, etc.};
- **Retirement** - defined benefit 401(a), 412(i), target, defined contribution {401(k), 403(b), 457, profits sharing, money purchase, etc.};
- **Executive Deferred Compensation Plans** - especially Sec. 457(f) plans for 501(c)3 and other not for profit organizations;
- **Flexible Benefit or Cafeteria / Sec. 125 plans** that offer employees a choice of multiple benefits;
- **Employee Assistance Programs; Wellness Programs; HIPPA; COBRA and FMLA compliance.**

PROFESSIONAL EXPERIENCE

Bushnell & Company - Atlanta, GA / Austin, TX (1996 - present) Founded the first Georgia based, fee only employee benefits consulting firm that specialized in serving organizations with 100 - 1,000 employees. Managerial responsibilities and professional consulting activities continued as before relocation to Atlanta and subsequently to Austin, TX, (due to spouse's employment transfer). During the first year of operation, 11 corporate clients retained the firm. Additionally, I have been retained as an employee for several consulting assignments during this time:

ProcessWorks, Inc., Brookfield, WI (2005 - 2007) Hired as Vice President, Business Development to further develop Southeast states of FL, GA, AL, MS, TN, NC & SC to attract business from larger employers with 1,000 - 10,000 employees as well as continue to nurture and grow brokerage relationships for small employer market. Company was purchased by United Healthcare Group in June 2006, focus was changed to soliciting employers through brokers / consultants exclusively with less than 500 employees because of system difficulties within the firm in serving larger employers. Position further changed to role of Account Manager to retain the few large employers that we had because of internal systemic issues and employee turnover.

National Financial Services Group, Atlanta, GA (2002 - 2003) Hired to consult, train and work with new agents of National Life of Vermont General Agency selling retirement plans to small employers funded by insurance company and proprietary equity products.

The Segal Company, Atlanta, GA (1999 - 2000) Hired as a Senior Employee Benefits Consultant, fee only, within a top 10 national human resources, compensation, actuarial and employee benefits consulting firm to sell brand and serve mid-market corporate and not for profit clients. Sold and delivered more than \$100,000 of new business services to clients in first three months with firm.

Pritchard & Jerden, Inc., Atlanta, GA (1998 - 1999) Hired as a Senior Employee Benefits Consultant, to establish a fee only employee benefits consulting practice within a 45 person insurance agency serving mid-market clients. Exceeded all sales goals in half the time allotted.

Gallagher, Flynn & Company, Burlington, VT (1993 - 1996) Director, Employee Benefits Division. After merging Bushnell & Company with this Certified Public Accounting firm in July 1993, I established and managed the firm's Employee Benefits Division. It was the first full service employee benefits consulting practice, within a CPA firm, in northern New England and was run as a separate profit center. In just 35 months, I grew the Division's revenue from \$115,000 to \$500,000 and produced a very significant bottom line.

Bushnell & Company, Burlington, VT (1973 - 1993) Founder of the first Vermont based, fee only, Third Party Administrator (TPA) of retirement (defined benefit and defined contribution) plans. The firm prospered and grew into a full service employee benefits consulting firm, including in-house actuarial services, a staff of 12 employees and annual revenues of \$1,000,000. Company eventually grew to be ten times larger than any comparable firm, in Vermont, at the time. Responsibilities included finances (budget, A/P, A/R, taxes, CPA, legal and banking relationships, etc.); personnel; marketing; sales; new business development; grow, nurture and maintain client relationships; design and implement new administrative systems and services to offer our clients / prospects, as well as the delivery of professional services, in a profitable manner, to organizations in northern New England and New York.

Independent Insurance Agent / Broker - Burlington, VT (1970 - 1981)

Deloitte & Touche, LLP - Staff Auditor at a Big 8 CPA firm - New York, NY (1969 - 1970)

EXAMPLES OF SIGNIFICANT PROFESSIONAL / BUSINESS ACCOMPLISHMENTS:

- ◆ Designed and developed a computerized information retrieval system (library) exclusively devoted to employee benefit related issues.
- ◆ While in insurance industry, earned multi-year membership in Million Dollar Round Table (MDRT) and other industry, company, agency awards and recognition for superior sales and service accomplishments such as National Sales Achievement Award (NSAA) as well as National Quality Award (NQA).
- ◆ First Vermont resident to become licensed as a fee only based Life and Health insurance consultant and to earn CEBS professional designation.
- ◆ Designed, installed and established the first self-funded medical plans for a private employer organization and a Taft-Hartley collective bargaining organization (IBEW) in Vermont.
- ◆ Designed and installed first Sec. 125 [premium conversion, flexible spending account, multi-option

(that included employer's choice dollars)] cafeteria plans, in Vermont.

- ◆ Established our company's Client Advisory Board.
- ◆ Developed and implemented a target/niche marketing plan to specific industries.
- ◆ Founded the Vermont Consultants Network - today it has 90 dues paying members.
- ◆ Listed in National Registry's Who's Who in Executives and Professionals since 1997.
- ◆ Adjunct Professor – Mercer University – Employee Benefit Health & Welfare Courses.

COMPUTER SKILLS & EXPERTISE

- **Operating Systems:** MS-DOS, Windows 3.1; 95, 98, ME, XP
- **Word Processing:** WordPerfect, Word
- **Spreadsheets:** Quattro Pro, Excel, Lotus 1-2-3
- **Databases:** Access, Q&A
- **Presentations:** Lotus Freelance, MS Power Point, Corel Presentations
- **Employee Benefits:** Pentabs, AutoDoc, Flextime
- **Marketing:** TeleMagic, On Time, Outlook, ACT!
- **Business:** Quicken, QuickBooks, CheckFree
- **Local Area Networks:** LANtastic, Novell with Perfect Office, Lotus Suites, MS Office
- **Payroll:** ADP; Paychex; Ceridian; Quicken; QuickBooks; CPS
- **Internet:** Built own website www.BushnellCompany.com
- **Intranets:** Have set up intranet sites for several client projects.
- **Web Based Benefits Administration:** Heavily involved in ASP vendor searches and installations.

System Skills:

- a. Directory tree and file organization for employee benefits consulting practice.
- b. Maintain and update "boilerplate" for plan documents, SPDs, communication pieces.
- c. Created and maintained, "Style Books" for professional consistency.
- d. Can install, uninstall and troubleshoot software.
- e. Electronic Data Interchange (EDI).
- f. Interactive Voice Response (IVR).

Design Skills: Designed, outlined, developed the logic, subroutines and reports for many computer programs and administrative systems that are used exclusively in the employee benefits / administration industry because "off the shelf software" either did not exist at the time or was not satisfactory to meet our company's needs or desired professional standards. These included, but are not limited to, the following:

1. **Project scheduling and management systems:** included employee workload analysis, warning system for approaching deadlines, fee income projection analysis, etc.
2. **Complete billing, financial and accounting systems.**
3. **Defined contribution record keeping systems.**
4. **Health and welfare annual report systems,** including utilization review analysis.

EDUCATION

- ▶ University of Vermont, Burlington, VT - 1979 - Bachelor of Science, Finance.
- ▶ Champlain College, Burlington, VT - 1968 - Associates, Business Management

Professional Designations & Continuing Professional Education

- ▶ Chartered Life Underwriter (CLU) in life and health insurance as well as financial planning from the American College - 1975
- ▶ Advanced Pension Planning Certificate from the American College - 1978
- ▶ Certified Employee Benefit Specialist (CEBS) in employee benefits from the Wharton School at University of Pennsylvania- 1987
- ▶ American Society of Pension Actuaries - candidate for Certified Pension Consultant (CPC) professional designation. Passed first of five exams.
- ▶ Keeps current in profession and business by earning 40+ CPE credits per year.

LICENSES

1. State of Georgia - Insurance Counselor for Life, Accident and Health Insurance.
2. State of Georgia - Insurance Agent for Life, Accident and Health Insurance.
3. State of Georgia – Variable Life Insurance and Annuity products.
4. NASD – Series 6 & 63 for Mutual Funds and Investment Advisory representation.

BUSINESS / PROFESSIONAL / CIVIC ASSOCIATIONS / LEADERSHIP

Currently or has maintained membership and sits/sat on the Boards of many organizations, and actively serving on a variety of committees, including, but not limited to, the American, Vermont and Georgia Society of Chartered Life Underwriters; Vermont Employers Health Alliance; Rotary International – Vermont and Georgia; American Society of Pension Professionals & Actuaries (ASPPA); ASPPA Benefits Council of Atlanta; Vermont Consultants Network; International Society of Certified Employee Benefit Specialists (ISCEBS); Georgia Chapter of ISCEBS; have taught CLU and CEBS courses, over the years, on the local level, and on the national level a Health Care course for the International Foundation of Employee Benefit Plans; Chamber of Commerce – Vermont and Georgia; Vermont Businesses for Social Responsibility; Vermont Health Foundation; Childrens Miracle Network Telethon; Georgia alumni chapter representative for University of Vermont; Vermont Golf Association; Committee Member of United States Golf Association; Head Coach, high school varsity golf team for seven years; volunteer PGA Tour BellSouth Classic, Tour Championship; Senior PGA Tour Nationwide Championship; and LPGA Chick-fil-A Charity Championship hosted by Nancy Lopez; United Way – Vermont and Georgia.

PRESENTATIONS AND ARTICLES

Have spoken at many educational meetings for various organizations, including the Vermont Bankers Association; Vermont Businesses for Social Responsibility; Vermont Society of Certified Financial Planners; Vermont Consultants Network; Vermont Society of CPAs; Rotary Clubs; Southern VT/NH Personnel Association; International Society of Certified Employee Benefit Specialist Annual Symposium; Mid-states Independent School Business Officers (MISBO); International Foundation of Employee Benefit Plans; Benefits Management Forum and Expo.

I have been quoted in and/or had articles published or written about me in Business Insurance; Burlington Free Press; Business Monday; Greater Burlington Business Digest Magazine; ISCEBS's Newsbriefs. Most recently I wrote the lead article for the September 2000 issue of Employee Benefits Management Directions published by CCH and was featured in the December 2001 issue of Employee Benefit News.