



WILLIAM B. FORNIA

Pension Trustee Advisors, Inc.

14 Beacon Hill Lane
Greenwood Village, CO 80111
PensionTrusteeAdvisors.com
303.263.2765

Personal Summary

William B. (Flick) Forna founded Pension Trustee Advisors and serves as president. PTA provides consulting services on public pension and retirement benefits to sixty clients. Previously, he led the public sector retirement plan actuarial consulting practice of a major consulting firm. His professional expertise is the analysis, design and modeling of postretirement employee benefits (pensions and health), particularly in the public sector.

Client Experience

Mr. Forna's work experience includes consulting for public and private sector retirement plans. He has consulted with numerous state and local government bodies regarding their public retirement systems, as well as with private sector and not-for-profit employers in the United States, Brazil and Argentina. He has also worked on federal, state and local compliance and accounting issues for many clients.

A frequent speaker, Mr. Forna has testified before legislative and judicial bodies in fifteen states. He serves many clients as expert witness and has testified in Federal District Court and U.S. Bankruptcy Court. Mr. Forna has published several papers on pension and retiree health issues and has been interviewed by various periodicals on pension issues. He has served public sector clients in thirty-four states and Puerto Rico, and has consulted on retirement issues involving seven of the ten largest US cities.

Mr. Forna was recognized with one of six retirement "Power Broker" awards by Risk & Insurance and Human Resource Executive Magazine in 2010.

Professional Organizations

Mr. Forna is a Fellow of the Society of Actuaries (1986), an Enrolled Actuary under ERISA (1984), a Member of the American Academy of Actuaries (1983), and Fellow of the Conference of Consulting Actuaries (2005).

He was elected to and serves on the Board of Directors of the Society of Actuaries, and is on the steering committee (past vice-chair) of the Conference of Consulting Actuaries Public Plans Community. He is on the Faculty of the Society of Actuaries Fellowship Admission Course and has previously served as chair and vice-chair of the Enrolled Actuaries Meeting Program Committee, on the Conference of Consulting Actuaries Committee on Professionalism, on the Public Pensions Subcommittee of the American Academy of Actuaries.

Education

He graduated from Whitman College with a Bachelor of Arts degree in Mathematics (1980).