Southeastern Actuaries Conference
2021 Annual Meeting
Speaker Bios

Building Communication Skills Through Improvisation

Bob Morand, AIA Search

Bob is the founder and lead partner of AIA Search, LLC. "AIA" stands for "Actuarial & Insurance Analytics," the space in which Bob has spent over 25 years recruiting professionals for every type of client within the insurance industry. Bob launched AIA Search in November of 2018 to provide a new concept in actuarial and insurance analytics recruitment...one which leverages his extensive experience and industry contacts, laser-focused market approach and executive search-level service to address clients critical hiring needs in today's ultra-competitive marketplace for talent. Prior to AIA Search, Bob was Sector Leader of Insurance for Korn Ferry, the global leader in executive search. Bob worked with Korn Ferry's executive search insurance practice while also developing the firm's professional search practice, which focuses on mid- to senior level talent in the insurance industry. Prior to joining Korn Ferry, Bob was President and Managing Partner of DW Simpson Global Actuarial & Analytics Recruitment, the leading search firm in this space. Bob was with DW Simpson for 25 years, the last eight as president.

Health Workshop – Risk Score Methodologies

Michael Forster, Wakely Consulting Group

Michael Forster joined Wakely Consulting Group in January 2016. He has extensive experience working with plans on data integration for population health analytics. This includes quality, risks score documentation, prescription drug utilization, clinical utilization, and financial performance. He has worked with Medicaid managed care plans, Medicare Advantage plans, and risk taking provider groups on these key analytical pillars. Michael has also certified Medicaid state ACO rates for Vermont and Medicare Advantage bids for MCOs throughout the country.

Matt Sauter, Wakely Consulting Group

Matt Sauter, ASA, MAAA, is a consulting actuary. Matt has been immersed in ACA risk adjustment since joining Wakely in 2014. He leads a risk adjustment project - WNRAR - where over 70 health plans participate to analyze key risk adjustment metrics such as transfers, supplemental claims, risk adjustment data validation (RADV) and much more. Matt also works on various other ACA projects including pricing & strategy, formulary development, and provider profiling among other areas. Outside of risk adjustment Matt also works with state agencies to understand and analyze policy changes and impacts to consumers. Matt also prepares bids for several MA-PD plans, performs adherences studies, and a variety of other projects.

David Walters, Wakely Consulting Group

David Walters joined Wakely Consulting Group in December 2014. With Wakely, David has concentrated his work in the Medicare Advantage space with particular expertise in Medicare Part D and pharmacy analytics. David also has developed expertise in Medicare Advantage risk adjustment, including contributions to White Papers in changes in risk score models and efforts to develop tailored risk score reporting for several clients.

Life Insurance Industry Update – Survey Overview
In-Depth Look At Life Insurance Survey

Christopher Halloran, Oliver Wyman

Christopher Halloran is a Principal with the Actuarial Practice of Oliver Wyman and leads the Charlotte office. His primary responsibilities are to provide actuarial consulting services to various insurance entities and organizations. Christopher joined Oliver Wyman in June 2016 after having previously worked for Gen Re as an actuarial associate. He graduated from the University of Connecticut with a Bachelor of Arts in Actuarial Science, Mathematics, and Economics in 2010.

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Current And Important Professionalism Topics

Al Bingham, Jr., American Academy of Actuaries

Al Bingham is a longtime volunteer with the American Academy of Actuaries and currently serves as its Vice President of Professionalism, in which capacity he is chairperson of the Academy's Council on Professionalism and as a member of the Academy Board of Directors. He also currently serves as a member of the Risk Sharing Subcommittee of the Academy's Health Practice Council, and as a member of the Actuarial Standards Board's ASOP No. 28 Task Force that revised the standard, Statements of Actuarial Opinion Regarding Health Insurance Assets and Liabilities, which becomes effective for work performed involving SAOs regarding health insurance assets and liabilities issued on or after July 1, 2022. Formerly, Al was the Vice-President of the Health Practice Council and also as a Regular Board member. Al is currently a Principal at NovaRest, Inc. specializing in work for state and federal agencies, insurance market policy initiatives and other health actuarial projects. He has over 40 years of health care actuarial professional and executive experience. Prior to NovaRest, he was a Senior Consulting Actuary with Wakely Consulting Group, specializing in ACA marketplaces, state insurance market sustainability initiatives, including 1332 Waivers, actuarial analyses of health policy proposals, and consulting to state insurance regulators and state and federal agencies. Prior to Wakely, Al was the Director of the Office of Special Initiatives and Pricing in the Center for Consumer Information and Insurance Oversight (CCIIO) at the Centers for Medicare and Medicaid Services (CMS). In that role, he functioned as the chief actuary at CMS for the commercial aspects of the Affordable Care Act. He was the senior actuarial advisor on various commercial insurance and ACA initiatives, including risk adjustment, health policy, rate review and analyses, insurance programs and insurance oversight activities. He worked closely with HHS and White House health policymakers. He formerly was Executive Director – Actuarial Services, East Regions for Kaiser Permanente, responsible for all actuarial services for the KP eastern regions.

Robotics

Francis Carden, Pegasystems

Francis was a founder of the RPA technology acquired by Pega in 2016 and a speaker, thought leader and evangelist on everything to do with “automation". Since joining Pega, Francis has been proactively involved in the core technology and marketing around the Intelligent Automation space, bringing together stories and insights across the globe. He is actively involved in Pega's leading Intelligent Automation platform which includes many of the latest advances in technology from Artificial Intelligence, Machine Learning, low-code, case management to end to end automation and Robotics. Francis has more than 30 years of experience running multinational technology companies and selling innovative technology all over the world.

The Future Of Actuarial Models

Nathan Worrell, Moody's Analytics

Nate currently works as a Client Relationship Actuary with Moody' Analytics, helping clients use the AXIS Actuarial modeling system. Prior to joining Moody's Nate has had roles in pricing and valuation for annuities and supplemental health products, including Disability, Long Term Care and Worksite benefits. He is an active volunteer with the SOA, serving on: the Research Communications Oversight Group, the LTC Section Council, and occasionally grading or writing exam questions. He has also been an active participant in SOA writing and essay contests, claiming prizes in "Actuarial Speculative Fiction", "Workable Innovations for Living Longer", and “Actuarially, I Believe This.." He also volunteers with The Actuarial Foundation as a mentor and judge for the Model The Future Contest.

Losing Ground In The Opioid Epidemic

Donald Sampson, Munich Re

A late comer to the actuarial profession, Donald Sampson graduated with a doctorate in mathematics in 2017. Since then he has worked in a variety of positions at Munich Re US Life in Atlanta. He has participated in various teams investigating opioids, mortality improvement, Covid-19 and other topics.

Fraud Investigations And Tools

Kevin Glasgow, Diligence International Group

Kevin Glasgow is the Vice President of Investigation Solutions with Diligence International Group, a premier international investigation firm that specializes in providing information solutions related to due diligence, fraud detection and fraud prevention. Prior to this, Kevin spent over 30 years leading claim teams in both the United States and Canada with such notable companies as GE, Swiss Re, and Munich Re. As part of leading teams, his work has included overseeing complex investigations and defending companies against fraudulent claims. This has also involved extensive collaboration with underwriters to prevent fraudulent risks from being written. He is a frequent speaker on the topic of insurance fraud and underwriting and claim conferences, is the past president of the International Claim Association and the current president of the Eastern Claim Conference. His designations include the FLMI, FLHC, and CLU® and he is also a Certified Fraud Examiner.

Life Insurance M&A

John Gramelspacher, Willis Towers Watson

John Gramelspacher is a Director at Willis Towers Watson, where he has worked for the last 3.5 years and also spent the first 5 years of his career. Prior to re-joining Willis Towers Watson, John worked for a larger reinsurer supporting the Individual Life Pricing department and assisting reinsurance clients in the development and support of their Automated Underwriting programs. He then worked for a large direct carrier and supported a variety of projection models for different lines of business and transitioned to leading a Special Projects team where he supported potential litigation work among other projects. Currently, John supports many types of projects at Willis Towers Watson with a focus on ULSG and other Interest Sensitive Life insurance products. The majority of his work relates to litigation support, M&A opportunities, and financial modeling of UL products.

What's New In Reinsurance – Annuity Financing Solutions

Kimberly Love, Canada Life Re

Kimberly is a Vice President and Marketing Actuary at Canada Life Reinsurance, servicing insurance company clients with both structured and traditional mortality solutions across the US. She joined CLRe in February, 2020, after over 15 years with direct insurers working primarily in Life and Annuity Product Development. Kimberly grew up in Connecticut and received her BA in Math and Economics from Duke University. She currently lives in West Chester, PA.

Justin Mosbo, Nassau Re

Justin is responsible for all actuarial functions of Nassau along with all M&A transactions across insurance/reinsurance, asset management and distribution. He previously served as vice president, Reinsurance Actuary for Global Atlantic where he focused on the structuring and underwriting of life and annuity reinsurance transactions. Prior to this, he served as Senior Manager in Ernst & Young's New York office where he helped clients with the actuarial due diligence, risk analysis, valuation and purchase accounting of life and annuity mergers and acquisitions. Prior to joining Ernst & Young, Justin spent seven years at Transamerica focusing on ALM, economic capital model development and two years executing internal reinsurance transactions as chief risk officer of a large Bermuda affiliate. Justin is a Fellow of the Society of Actuaries, a Member of the American Academy of Actuaries, a CFA charter holder and holds the Professional Risk Manager certification. He holds a B.A. in Math/Statistics from Luther College in Decorah, Iowa.

The ACA Today

David Hayes, Milliman

David is a principal and consulting actuary with the Atlanta office of Milliman. He has over 25 years of experience as a health actuary. In addition to his time with Milliman, David also spent several years at Anthem working in the individual, small group, and Medicare lines of business. David works with many different health insurance carriers and provider organizations. He assists clients in developing and evaluating strategies in the commercial, Medicare, and Medicaid markets.

<u>RPA Automation And Calculating ROI</u>

Joanne Galimi, Gartner Consulting

Ms. Galimi is a Senior Managing Partner and Healthcare Industry Practice lead within Gartner consulting. Ms. Galimi has more than 35 years of healthcare experience providing direct, on-demand IT and business analysis and advice to healthcare IT and business executives relating to IT strategies, software systems, risk assessments, vendor assessments, operational processes and transformation initiatives. Ms. Galimi was part of Gartner's research organization for 12 years advising healthcare payer IT and business executives on business trends, processes, applications and emerging technologies. Healthcare areas of research include: business intelligence, business process management, customer relationship management, business process outsourcing, care management, IT budgets and IT staffing. Prior to joining Gartner, Ms. Galimi was a Strategic Planning Executive at Harvard Pilgrim Health Care. Ms. Galimi completed a number of projects including; IT systems plans for 14 health centers, managed the implementation of the Epic suite of projects within the 14 health centers, facilitated and developed new IT service-level agreements between the health centers and Harvard Pilgrim Health Care's IT departments. Previously, Joanne was a consultant for Ernst & Young. Representative engagements include: IT strategic plans for CIOs of large healthcare payers within the US; System selection projects for health insurance organizations looking for EHR and core administrative systems; Business process re-engineering for healthcare payers, hospitals and physician practices, and IT risk assessment to reduce IT risks and improve business value. Ms. Galimi holds a bachelor of science degree in management from the University of Massachusetts.

<u>RADV Primer</u>

Andrew France, Florida Blue Medicare

Andrew France is Florida Blue's Vice President of Actuary Medicare. In this role, France is accountable for three areas inside of actuarial: Government Markets, Reserving and Forecasting, and the Value Based Provider Arrangements. Prior to joining Florida Blue in 2001, France worked as a high school math teacher as well as a basketball and softball coach in North Carolina. He began his actuarial career working in the Group, Over 65 and Individual market before directing the Health Care Reform modeling leading up to the implementation of the Affordable Care Act (ACA). His particular model created opportunities to influence the Centers for Medicare and Medicaid Services (CMS) and state policy on ACA risk adjustment and rating rules. The model was then used to create exercises that informed Florida Blue's actuarial department, senior leadership, and the Office of Insurance Regulation's leadership on ACA rules and complications. Throughout his career, France has been active in community and professional organizations. He is a fellow of the Society of Actuaries and a member of the American Academy of Actuaries. France received a Bachelor of Arts while he double majored in mathematics and political science at The University of North Carolina - Chapel Hill, winning awards for outstanding oratory and intramural sports performance.

<u>Without A Crystal Ball…What Is Long COVID</u>

Regina Rosace, Scor Global Life Americas

Dr. Regina Rosace is a VP and Medical Director at Scor Global Life Americas. She graduated from Northeast Ohio Medical University, completed a pediatric residency in Phoenix, Arizona, and spent 20 years practicing pediatric emergency medicine in Cleveland, Ohio, before transitioning to Insurance Medicine. She has been working in the industry for 10 years, is currently Chair of the Professional and Public Relations Committee for the American Academy of Insurance Medicine and is a Past-President for the Midwestern Medical Directors Association. Now that she has left clinical practice, she gets her "kid fix" hanging out with her nine (yes, nine!) children, and 4 grandchildren.

<u>If You Were Only More Generous, You'd Save Money</u>

Michael S. Adelberg, Faegre Drinker Consulting

Mike Adelberg leads the Healthcare Strategy Practice at Faegre Drinker Consulting. He has 25 years progressive healthcare industry and government experience in Medicare, Medicaid and commercial health insurance. Mike spent fifteen years at the Centers for Medicare and Medicaid Services (CMS), including concurrently serving as the director of the Insurance Programs Group and the acting director of the Exchange Policy and Operations Group in the Center for Consumer Information and Insurance Oversight (CCIIO). He also served as the Director of Medicare Advantage Operations, where he supervised the annual cycle for review and approval of Medicare Advantage contracts and plans, developed CMS's operational policy, and led the monitoring of Medicare Advantage contractors. Mike gained private sector experience as vice president of product development and government affairs for the Universal American Corporation, a multi-state health insurer which operated Medicare Advantage and Part D plans. He has also led or co-led health policy studies published in Health Affairs and The American Journal of Managed Care. Mike speaks and publishes frequently on Medicare Advantage topics including provider networks, benefits, marketing, and plan oversight. He's been quoted in the Washington Post, New York Times, Modern Healthcare, NPR, and other leading media. In his spare time, Mike is an author. He's written three novels, a history book, several scholarly journal articles, and over sixty book reviews.

Lauren Driscoll, Project Well

Lauren has founded Project Well to support health plans and at-risk providers' efforts to address the most actionable and critical non-clinical needs of their members and patients – nutrition and social isolation. Prior to Project Well, Lauren was a senior leader in the Strategy practice at Leavitt Partners, a "Health Intelligence" firm founded by former Secretary of Health and Human Services, Michael Leavitt. Lauren served as Corporate Director of Oxford Health Plans, where she led Oxford's Medicare business. Lauren is co-chair of the United States of Care, Entrepreneurs Council. Lauren is also a Board Member at Village Health Works, a healthcare organization that addresses the root causes of illness, poverty and neglect in Burundi, Africa. She has served as the Acting Executive Director of Village Health Works, as well as the Chair of the Kigutu Hospital Development Committee. She was faculty at Singularity University's Exponential Medicine 2016 conference – addressing the potential of technology to democratize healthcare in the developing world. She is also a member of the University of Virginia College of Arts and Sciences Foundation Board. Lauren grew up in Baltimore, MD. She received her BA from the University of Virginia and her Master's in Public Health from the Mailman School of Public Health, Columbia University.

Henry W. Mahncke, Posit Science

Dr. Henry Mahncke joined Posit Science at its inception as Vice President of Research & Outcomes, where he led the first large-scale clinical trials of a publicly available cognitive training program. He now serves as CEO of Posit Science, where his focus is ensuring that the breakthrough science of brain plasticity can help every brain on the planet. Previously, he worked as consultant at McKinsey focused on health care and video games, and then as a science and technology advisor to the British government. Dr. Mahncke earned his PhD in Neuroscience at the University of California, San Francisco.

Dirk Soenksen, Ceresti Health

Dirk Soenksen is co-founder and CEO of Ceresti Health, a digital health company that specializes in virtual care for patients with caregiver-supported conditions (e.g., dementia, stroke, Parkinson's). The Company is first to market with a digital caregiver support program that has been shown to reduce healthcare costs for patients with Alzheimer's Disease and related dementias. Prior to co-founding Ceresti, Mr. Soenksen was founder and CEO of venture-backed Aperio which he built into the recognized global leader in digital pathology. Aperio was acquired by Danaher/Leica Biosystems in October 2012. In 2006, Mr. Soenksen founded the Digital Pathology Association (DPA), a non-profit organization comprising major vendors and leading pathologists, with the goal of establishing best practices and increasing awareness of digital pathology. Dirk served as President of the DPA from its inception until 2012, and as a board member of the DPA through the end of 2014. He has an undergraduate degree in Chemistry from Bowdoin College, and a graduate degree in electrical engineering from the University of Pennsylvania. He also earned his MBA from Pepperdine University.

<u>CMMI Initiatives And The Future Of Value-Based Arrangements</u>

Dani Cronick, Wakely Consulting Group

Dani Cronick, FSA, MAAA is a Senior Consulting Actuary in the Denver office of Wakely Consulting Group, LLC. Prior to joining Wakely she worked for Humana on Medicare Advantage plan pricing. Since joining Wakely in 2017, she has supported providers within the Medicare Shared Savings Program, through risk sharing arrangements with payers, and in contract evaluation. She has also worked with payers within their Medicare Advantage bid pricing—including pricing of Employer Group Waiver plans—and both Individual and Small Group Commercial filings. Outside of pricing, Dani has supported clients in various strategic and competitive analysis efforts, including support for and development of the Wakely Medicare Advantage Competitive Analysis dashboard. She also has experience in the quality space working with Medicare Advantage Star Ratings, including evaluating the latest regulatory changes to Star Ratings and dissecting emerging trends in the Star Rating program.

Brad Heywood, Wakely Consulting Group

Brad Heywood is an Associate Actuary with Wakely Consulting Group. At Wakely, Brad has quickly become a provider risk expert and has helped multiple ACO’s and DCE’s navigate the ever changing CMMI/CMS programs, specifically the new Direct Contracting program. Brad has become a subject matter expert in CMMI's Direct Contracting program and has presented on the program in numerous conferences to help provider groups understand the risks and rewards associated with the program. He has also been involved with various other areas within healthcare such as ACA rate filings, Medicare Advantage bids, Medicaid financial reporting / rate review, and value-based modeling.