

# **Southeastern Actuaries Conference**

## **2021 Spring Meeting**

### **Speaker Bios**

#### **Professionalism and You**

##### **Nancy Behrens, Academy Committee on Professional Responsibility**

Nancy Behrens is retired from State Farm Life Insurance Company. Prior to her retirement, she was the Chief Actuary for Life and Health Insurance at State Farm. She has served as an SOA Board member and Vice President and has been very active in the Education and Examination system for many years. She served 6 years on the ABCD and is a frequent facilitator for both the Fellowship Admission Course and the Associate Professionalism Course.

#### **The SOA Competency Framework – Design Your Future**

##### **Rich Junker, Greenwood Consultants**

Rich Junker has spoken at numerous actuarial meetings about using the Competency Framework to help actuaries and other professionals to take stock of their entire skill set, to objectively examine the skills they possess but more importantly, to evaluate and enumerate the skills needing enhancement. He has co-written several articles in the Actuary Of The Future and International Section newsletters to guide users through the process of executing the Competency Framework tool and applying it to designing their careers and their lives.

#### **Legislative Update For ACA Markets**

##### **Gabe McGlamery, GuideWell/Florida Blue**

Gabriel McGlamery, J.D. is in charge of Federal regulatory policy for Florida Blue's individual market business. This means analyzing, influencing, and general problem-solving issues relating to risk adjustment, premium subsidies, and interoperability for roughly 10 percent of Marketplace enrollment. Prior to joining Florida Blue, Gabriel helped develop the rules for the ACA at HHS. He graduated with honors from the University of Connecticut School of Law where he was the editor-in-chief of the Connecticut Insurance Law Journal.

#### **Modernization Into Agile**

##### **Katy Geller, PwC**

Katy Geller is a director with PwC's Actuarial Services practice in New York. She specializes in Actuarial Modernization focused on model and process transformation. Katy has been part of several large-scale transformation projects using both Agile and Waterfall approaches. Katy is a Fellow of the Society of Actuaries and a member of the American Academy of Actuaries. She also holds a SCALe Agile practitioner certification.

##### **Lu Xue, PwC**

Lu Xue is a manager with PwC's Actuarial Services practice in New York. She specializes in Universal Life and Long Term Care products and has extensive experience in model conversions, actuarial modernization, M&A and financial reporting. Lu is a Fellow of the Society of Actuaries and a member of the American Academy of Actuaries.

#### **Social Determinants Of Health: Case Study Insights**

##### **Ksenia Whittal, Wakely Consulting Group**

Ksenia has over 16 years of experience as a healthcare actuary. Ksenia's recent focus has been on ACA pricing support for commercial carriers; supporting Medicaid state agencies, Health Plan Association and individual Medicaid MCOs on a wide range of issues such as risk adjustment, rate development review, feasibility analyses; 1332 waiver and state policy analyses, COVID-19 analytics, CMMI VBID program benchmark development, and quantifying impact of programs addressing social determinants of health. Additionally, she has significant experience supporting non-profit new entrant carriers in ACA market with feasibility analyses, pro forma modeling and traditional actuarial functions.

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#### **Model Governance – Adjusting To Change**

##### **Josh Chee, Oliver Wyman**

Josh Chee is a Senior Consultant in the Toronto office of Oliver Wyman's actuarial practice. His primary responsibilities are to provide actuarial consulting services to various insurance entities and organizations. Josh has over 7 years of experience, primarily centered in model development, model validation and review, and model risk management. He has recently been supporting clients to establish, implement, and execute model governance frameworks.

##### **Joy Chen, Oliver Wyman**

Joy Chen is a Senior Consultant in the New York office of Oliver Wyman's actuarial practice. She has over 7 years of consulting experience specializing in model conversion, implementation, validation, and governance. She recently managed a large-scale effort to implement and test controls for a mid-sized life insurer.

##### **Kevin Desmond, Oliver Wyman**

Kevin Desmond is a Senior Consultant in the Chicago office of Oliver Wyman's actuarial practice. He has been in actuarial consulting for about 8 years. His primary experience has been assisting companies with US GAAP valuation, modeling, and controls, with a particular focus on long duration targeted improvement ("LDTI") implementations for life business.

#### **Accounting Perspective To LDTI**

##### **Srini Iyer, Moody's Analytics**

Srini, a consulting leader in Risk and Accounting Solutions, focuses on insurance asset and liability valuation, accounting changes (IFRS17, IFRS 9, Long Duration), machine learning, solution architecture, product strategy and business development. Prior to joining Moody's in 2019, he had more than 15 years of management experience in financial services, including positions at SAS, S&P Dow Jones Indices, and AIG. He also was a software consultant at Merrill Lynch.

##### **Moun Seo, Moody's Analytics**

Moun Seo is a Director in the Solution Specialists team. His expertise is on the software implementation of regulatory compliance and balance sheet management solutions for domestic and international financial institutions. He has 13 years of experience in the software implementation space. He has always been in the regulatory compliance space, starting his career in banking with credit risk and regulatory capital, as well as market risk, liquidity risk and asset liability management. From there, he transitioned to various accounting standard, such as IFRS 9 and CECL, as well as IFRS 17 and US GAAP LDTI.

##### **Dieter Van der Stock, Moody's Analytics**

Dieter Van der Stock is in charge of the accounting aspects in the delivery of the RiskIntegrity™ for IFRS 17 and RiskIntegrity™ for LDTI solutions for Moody's Analytics insurance business. Currently, he is focused on helping insurers understand the implications of all IAS, IFRS and US GAAP standards that affect their portfolios. Previously, Dieter was involved in IFRS 9 and CECL projects for banks, in addition to Final Basel III, AnaCredit, ALM, and liquidity management.

#### **Indexed Life And Annuity Market Trends And Updates**

##### **Tresor Allade, American Equity**

Tresor Allade is an Innovation Actuary at American Equity Life Insurance. He is mainly responsible for the pricing and technical assessment of new product features and benefits along with the analysis of competitor's products within the FIA and broader retirement industry. Prior to joining American Equity, he worked as a Consultant with the Actuarial Practice of Oliver Wyman and as a Pricing Actuary at Protective Life.

##### **Dylan Strother, Oliver Wyman**

Dylan Strother is a Principal in Oliver Wyman's New York office. He focuses mainly on life insurance products including regulatory developments, financial reporting, and M&A.

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#### **Long-Term Care Risk: Past And Future**

##### **Roger Loomis, ARC**

Roger Loomis, FSA, MAAA is a principal and consulting actuary at Actuarial Resources Corporation (ARC) in Overland Park, KS. He wrote the SOA monograph "Understanding the Volatility of Experience and Pricing Assumptions in Long-Term Care Insurance," which is on the syllabus for the SOA's Exam, "Life Product Management."

#### **Hospital Price Transparency – So Close, Yet So Far**

##### **Phil Ellenberg, Milliman**

Phil has been working in the employee benefits space since 2009. Prior to joining Milliman, he worked as an independent fiduciary overseeing claims appeals and as a paralegal for a boutique ERISA litigation firm before that. Phil has a diverse background comprised of subject matter expertise related to administering self-funded health plans and technical proficiency of advanced analytics. He currently works with employer groups, brokers, health insurance carriers/TPAs, and providers. His client activities include cost driver analysis, analyzing provider reimbursement arrangements, dashboard and data warehousing development, benchmarking, and program effectiveness studies.

##### **Josh Reinstein, Milliman**

Josh has been working as an actuary in the healthcare industry since 2006. Prior to joining Milliman, he served as an associate actuary with OptumInsight. Josh works with Blue Cross and Blue Shield plans, HMOs, health insurance carriers, and provider organizations. His client activities include analyzing provider reimbursement arrangements and provider contracts, developing and analyzing shared-savings arrangements, product development and pricing, cost and utilization reporting, benchmarking, model development, and development of Medicare Advantage bids.

#### **The Changing Health Insurance Landscape**

##### **Geoff Cich, Florida Blue**

Geoff Cich is a Director of Competitive Intelligence for Florida Blue. His career in competitive intelligence began at UnitedHealthcare where he both created the function and developed the team and the framework over a 20-year period. He evolved the role to support market strategy and was instrumental in utilizing core filing information from the NAIC, DMHC, CDI and the 3 blanks in order to support financial and membership analysis - which remains a pivotal feature of his work today.

#### **Key Trends In 2021 Pricing**

##### **Adam Rudin, Wakely Consulting Group**

Adam Rudin, FSA, MAAA is an actuary who has worked in the health insurance industry for nearly 30 years. He has had varied experiences, including responsibilities for individual, small group, and large employer health insurance markets. Adam has had a wide variety of management responsibilities including direct profit and loss accountability, general management, and direct interactions with large employers. Throughout his career Adam has been involved in all aspects of actuarial work, including pricing, reserving, forecasting, underwriting, risk adjustment, provider analysis, regulatory analysis, and has given testimony in state legislative hearings.