

Southeastern Actuaries Conference

2023 Spring Meeting

Speaker Bios

2025 Medicare Advantage Pricing - Wakely

Part 1

Karen Ristagi

Karan is a Director and Senior Consulting Actuary with Wakely and has over 15 years of experience. He specializes in ACA individual and small group markets and using actuarial knowledge to guide strategic direction. Karan led the development of Wakely's ACA pricing models.

Michelle Anderson

Michelle is a Senior Consulting Actuary with Wakely. Since joining Wakely in 2014, Michelle Anderson has supported the start-up and strategic growth of multiple commercial insurers in a variety of ways including market feasibility, financial projections and licensure, product design, and working with and/or certifying individual and small group Affordable Care Act (ACA) rate filings in over 15 states.

Part 2

Thomas Grivakis

Thomas is a Senior Consulting Actuary with Wakely and has over 10 years of experience. He specializes in Medicare Advantage and Part D pricing and strategic support. He is currently working with several carriers and provider sponsored health plans on pricing, reserving, proforma, MA market entry, and risk adjustment.

David Walters

David is a Senior Consulting Actuary with Wakely. Since joining Wakely in 2014, David's primary expertise is in pharmacy analytics and Medicare Advantage risk adjustment. He is Wakely's expert on Medicare Advantage Part D. David has researched the impacts of changes to the EDPS risk score models and authored papers on the impacts of the CMS transition to EDPS risk adjustment methodology.

Michael Forster

Michael is a Senior Consulting Actuary with Wakely. Michael joined Wakely in 2016. He has extensive experience working with payers and providers taking risk in the Medicare Advantage, Medicaid, ACA, and large group markets. He has led pricing, forecasting, and analytics projects for health plans and state agencies throughout the country.

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Seize the Day: How to Take Advantage of Unprecedented Underwriting Innovations

Jenna Fariss, Milliman Intelliscript

Jenna is Director and Actuary at Milliman IntelliScript, where she helps carriers evaluate and implement insurtech innovations that add protective value and next-level risk assessment to their underwriting workflows and business strategies. She often joins forces with reinsurers to critically assess new tools and guide clients as they adopt new technology or adapt underwriting guidelines to reflect evolving best practices. With 20+ years of industry experience, she brings both a high-level perspective and hands-on practical experience to any discussion of risk in insurance.

Part 1

Jackie Waas, RGA

Jackie is the Vice President of Underwriting Research & Development at RGA. In her current role, she is involved in investigating and developing underwriting innovations, with an emphasis on concept development, research, and validation.

Taylor Pickett, RGA

Taylor is a Vice President and Actuary at RGA. He currently serves as the actuarial subject matter expert for underwriting modernization in US Mortality Markets Pricing. Taylor assists clients in understanding, incorporating, and evaluating the impacts of emerging underwriting programs and new sources of evidence.

Emily Rowland, Milliman Intelliscript

Emily is a Marketing Actuary at Milliman IntelliScript. She supports tools used for individual underwriting and risk assessment including Irix® – Medical Data and the Risk Score predictive models. Emily partners with teams across Milliman to conduct proof-of-concept analyses and provide day-to-day support for clients, which include insurance carriers offering individual plans in the life, Medicare Supplement, disability, and long-term care markets.

Chris Fierer, Milliman Intelliscript

Chris received his B.S. in Computer Science from Virginia Tech. He joined Milliman IntelliScript late last year, bringing valuable experience in healthcare interoperability and analytics to IntelliScript's Health Data Innovations team. He's currently serving as Product Leader for EHR products. Chris and his wife Lindsey have four children – Grace, Hadley, Ben, and Graham. When he's not chasing them, he plays guitar, reads, hikes, and does F3 workouts.

Part 2

Emily Rowland - Above

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Hayley Vrchota, Milliman Intelliscript

Hayley, PharmD, CTTS, is a clinical consultant at Milliman IntelliScript. Hayley has clinical pharmacy experience that includes psychiatric, tobacco treatment, and addiction therapies, which gives her specialized insight into the behaviors and treatments that can help underwriters consider a broad spectrum of health risks when assessing insurance applicants.

The A-B-C-Ds of Guidance and Discipline

John Schubert, Deloitte

John is chairperson of the Actuarial Board for Counseling and Discipline, the U.S. body that responds to actuaries' request for guidance on professional issues and considers complaints about possible violations of the Code of Professional Conduct. He is a longtime volunteer with 31 years of dedicated service to the American Academy of Actuaries, spanning 50 different roles in numerous professionalism, public policy, and governance committees.

Cell and Gene Therapy: A Fuller Picture of the Benefits and Risks for Sickle Cell Disease

Amy Earhart-Connell, Gallagher Re

Amy is a Clinical Advisor and Servicing Broker at Gallagher Re. Her 15+ years of clinical experience include critical care nursing in the ICU/CVICU/ED, Organ Procurement and Transplantation, and Care Management and Utilization Management in the Critical Care and Level 3 NICU settings. She also worked closely with the financial and actuarial teams on reinsurance claims and population health/social determinant of health programs.

Wendy Windsor, Gallagher Re

Wendy is a Placement Broker at Gallagher Re. Her 35 years of healthcare experience ranges from work in cardiology and hematology laboratories, benefits analysis at HCA, underwriting for CIGNA, reinsurance brokering and analytics, and L&AH valuation. She brings collaborative engagement, insightful data analysis, and creative solutions to her clients and insurance partners.

Revolutionizing Healthcare: The latest Trends and Developments

Haitham Aly, Oliver Wyman

Haitham is a Senior Manager in the Actuarial Practice of Oliver Wyman based in Atlanta, GA. Haitham joined Oliver Wyman in 2023 after over eight years with Milliman, Inc. Haitham brings deep subject matter expertise in a variety of focused areas. Haitham's main areas of expertise

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include both pricing and strategy for Medicare Advantage and Commercial lines of business (ACA, small group, large group, MEWA).

Jeanne, Stokke, Oliver Wyman

Jeanne is a Senior Manager in the Atlanta office of Oliver Wyman Actuarial Consulting, Inc. Jeanne has worked in the actuarial profession for 7 years. She works with health insurers, regulators, and providers. Her work with health insurers includes ACA pricing, Large Group pricing, and support with provider contracting.

Health equity – Important Takeaways, Not Just for Health Actuaries

Annette James,

Annette is President & CEO of Ibis Actuarial Consulting, LLC. She is a former regulatory actuary specializing in health insurance and healthcare analysis, with a particular focus on financial solvency, financial reporting, healthcare policy and healthcare reform. Annette is also an active volunteer in the actuarial profession. She is currently a member of the American Academy of Actuaries' Board of Directors, chairs the Health Committee of the Actuarial Standards Board, as well as the Academy's Health Equity Committee, and its Diversity, Equity and Inclusion Committee.

Yi-Ling Lin, Terry Group

Yi-Ling is a healthcare actuary and financial strategist. She is a pioneer in the development of sophisticated analytics that support organizations in navigating the new healthcare environment. In addition, Yi-Ling has over 20 years of experience advising clients on strategic planning, pricing and contract negotiations. Yi-Ling is a member of the Academy's Health Equity Committee, a co-founder of Abacus Actuaries and the current President-Elect of the Conference of Consulting Actuaries.

Trends in Actuarial transformation

Vikas Advani, Oliver Wyman

Vikas has 15 + years of experience on end-to-end life insurance and actuarial transformations with a focus on data and technology.

Andrew Samuels, Oliver Wyman

Andrew has 10+ years of experience spanning actuarial modeling, data, technology and financial system integration.

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Morgan Poropatic, Oliver Wyman

Morgan has 5+ years of experience in modeling, financial reporting and experience studies

William Konop, Oliver Wyman David Walters

William has 5+ years of experience on end-to-end data transformation, transformations from legacy systems (COBOL, SAS, Mainframe, etc.), and process improvements.

Life & Annuity Reinsurance Landscape in Bermuda

Jennifer Ostetrico, Milliman

Jen Ostetrico is a consulting actuary with Milliman's Chicago Life practice, working primarily on Bermuda modeling and mergers and acquisitions. Before joining Milliman, Jen spent over 10 years in the Life & Annuity insurance space, focusing on regulatory modeling, ALM and capital management.

Climate Risk Modelling – Scenario Analysis Approach

Pawel Lojko, Moody's Analytics

Pawel works as a solution specialist at Moody's Analytics with the primary responsibility for orchestrating technical market risk modeling sales and thought leadership for the North American Market. He has worked across a variety of actuarial roles, including ALM and Capital Management and ALM Stochastic Validation. Pawel has been with Moody's for over six years now.

Navigating the Regulatory Landscape: A Brief Update for Life Actuaries

Leslie Jones

Leslie is a regulatory actuary with more than 30 years of experience. During her tenure with the SC Department of Insurance she served in various capacities, including Deputy Director and Chief Actuary. Leslie was also actively involved with the NAIC and served as Chair and Vice-Chair of various working groups and task forces, including the Life & Health Actuarial Task Force. Leslie also has consulting experience and experience working with two large insurance companies. She is currently a member of the American Academy of Actuaries Life Reserves Work Group and PBR Implementation Work Group.

ACO REACH – Basics and Strategy

Jeff Grover, Complete Health

Jeff Grover is the Vice President of Actuarial Services at Complete Health, a primary care provider group in Alabama and Florida that takes both full-risk Medicare Advantage and Part D

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and ACO REACH risk on its patients. Jeff began his actuarial career in MAPD consulting, performing bids, forecasting, and reserving work for payer clients. Later, his focus shifted to provider sponsored health plans, and consulting for provider groups taking both MSSP and MAPD risk.

An ACA Update from a Guy with a Pathological Obsession with Risk Adjustment

Gabriel McGlamery, Florida Blue

Gabriel is responsible for helping Florida Blue understand the ACA's complicated systems and how they shape insurer incentives in the individual market. He has been responsible for Florida Blue's individual market federal regulatory policy and providing analysis and education to shape the development of the ACA market. Prior to joining Florida Blue, Gabriel worked at CCIIO on the ACA's benefit and rating rules. 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

Actuaries Do It With Models

Gemma Harding

Gemma, a British Actuary, possesses 18yrs of Life Insurance experience and is a Fellow of both the Institute and Society of Actuaries. Gemma has worked for HSBC, Deloitte, AIG and SCOR before becoming an independent contractor in 2020. Her primary focus throughout her career has been leading valuation teams, overseeing a diverse range of products and assumptions, navigating regulatory frameworks and managing software systems, including software conversions. More recently, Gemma has been guiding clients through the implementation of LDTI.

Artificial Intelligence – Evolving Governance in a Rapidly Changing

Whitney Heflin

Whitney Heflin is the Senior Director of Enterprise Risk Programs at GuideWell where she leads the Enterprise Risk Management, Business Continuity and Third-party Risk Management Programs. In her role she is accountable for supporting GuideWell in its mission to help people and communities achieve better health. The ERM Program supports the GuideWell mission by driving actions that enable the company to become a leading innovator, enabling healthy communities. Prior to her current role, Whitney served in leadership positions within Internal Audit, led the creation of the Portfolio Management function within GuideWell's Corporate Development & Strategic Investments area, and is experienced in process transformation and change management practices.

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Catalysts for Reinsurance: Retail Annuities

Matt McPhail, Fortitude Re

Matt is a pricing actuary with Fortitude Re based out of Bermuda. Matt's focus is on block reinsurance and M&A transactions spanning a wide range of product lines and geographical regions. Prior to joining Fortitude Re, Matt held consulting roles supporting insurance companies in modeling, inforce management, and M&A transactions

Dario Flood, Ernst & Young

Dario is a Senior Manager in EY Bermuda's life actuarial consulting team. During his time in Bermuda, Dario has assisted nearly a dozen new entrants in Bermuda. Dario supports with due diligence for new transactions. Before joining EY Bermuda, Dario worked in the UK, where he supported European insurers with modeling and analytics.