**MARKETING & DISTRIBUTION SECTION**

**MARKETING & DISTRIBUTION SECTION COUNCIL**

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| Keith Dall, *Chairperson* | Stephen Dobronyi | Chuck Ritzke |
| Andy Ferris, *Vice-Chairperson* | Michael Kaster | Maria Thomson |
| Jennifer Brady, *Secretary/Treasurer* | Nancy Manning | Jim Wiseman |

**INSTRUCTIONS**

**Please vote for up to three candidates.**
**The top three candidates will receive three-year terms.**
**Only names of persons who have indicated they would serve, if elected, are listed on the ballot.**

**INFORMATION ABOUT NOMINEES:**
The following applies to each section. The name of the candidate who submitted his or her biographical information first appears first on the ballot. All others follow in alphabetical order. Biographical information and answers to the question are as provided by the candidates. Biographies are limited to identification of employment, major fields of professional activity, service in the Society of Actuaries, and other relevant experience.

**CANDIDATE QUESTION:**
*Why are you interested in leading the Marketing & Distribution Section as a council member?*

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**Brian Woolfolk, FSA, MAAA,** Senior Vice President, Annuity Product Management, Aviva USA, Des Moines, IA
**Professional Background:** Product development actuary specializing in the pricing, product development, management and administration of annuity and life insurance products with a current emphasis on indexed annuities.
**Society of Actuaries Activities:** Moderator for session 43, Cracking the Code: Insurer Solutions to Baby Boomer Retirement Income Needs, at the 2008 Life Spring Meeting. Speaker at session 128, Indexed Products, at the 2008 Annual Meeting.
**Why are you interested in leading your section?** I am interested in participating in the leadership of the Marketing and Distribution Section to share my ideas for the future of distribution and marketing of life insurance and annuities. I also look forward to the networking opportunities associated with the position.

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**James Harkensee, FSA,** Vice President, Product Development & Corporate Development, Fidelity Life Association, Oak Brook, IL and President, America Direct Agency (subsidiary of FLA), Rolling Meadows, IL
**Professional Background:** Experience as a financial actuary and Chief Actuary as well as management of product development. Built Zurich Direct Agency into one of the leading direct writers of term insurance in the life insurance industry from 1994 to 2002.
**Society of Actuaries Activities:** Past member of the E&E committee both as a grader as well as an exam Vice Chair.
**Relevant Experience:** Eleven combined years of experience in leadership of two separate Life Insurance agencies (Zurich Direct and America Direct). Currently responsible for Product Development for Fidelity Life Association.
**Why are you interested in leading your section?** I have the unique experience as an actuary of having built from scratch, and managed, a large life insurance agency. I understand first-hand the challenges and difficulties facing distribution organizations. Also, through my current product development role, I have experience working with several different types of non-traditional distribution (including fee-based financial planners, multi-level marketers, and bank distribution) as well as the more traditional general agents and direct marketing organizations. I think I would be able to bring a unique perspective to the section leadership role as well as direct access to the thinking of some of the more successful distribution organizations in the industry.

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**Jeff Johnson, ASA,** Director of Product Development, Forethought Financial Group, Indianapolis, IN

**Professional Background:** Over 25 years of broad experience in small and large insurance companies, ranging from actuarial financial reporting and product pricing to management of marketing functions. Focus has most recently been on preneed and final expense products, but experience also includes indexed annuities, fixed rate annuities, universal life, credit life & disability, and individual health products.
**Society of Actuaries Activities:** Panelist – SOA July 2008 Webcast: Preneed Insurance Issues and Trends
**Relevant Experience:** Participation in SOA Preneed Mortality Work Group; Recent roles at Forethought – Marketing research director 2004-2007, Strategic planning director 2001-2003, Sales and marketing business unit leader 1997-2001.
**Why are you interested in leading your section?** Most importantly, it's time for me to give back to the profession some of what I have received. I also expect to leverage my background, derived from a unique combination of roles and product, distribution, and training experiences. I look forward to blending my skills, knowledge, and networks with others to produce effective council leadership and meaningful, innovative content.

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**Jason Rickard, FSA, MAAA,** Associate Vice President, Actuary, Hannover Life Reassurance Co., Orlando, FL
**Professional Background:** I joined Hannover Life Re America in September 2007. At HLR, I am responsible for directing the pricing activities for the Mortality Solutions business segment. Before joining HLR, I served as Senior Actuary for Northwestern Mutual Life and as Assistant Vice President for Lincoln Financial Group, where I developed and implemented a variety of new life and annuity insurance products. I also spent three years with ING Reinsurance, where I served as the Regional Head of Pricing.
**Relevant Experience:** I am a member of the American Academy of Actuaries (MAAA, 1998) and a Fellow of the Society of Actuaries (FSA, 2000). I am currently in the process of completing the requirements for the Chartered Life Underwriter (CLU) designation and have had experience over the past 15 years working with sales and distribution groups in my various roles.
**Why are you interested in leading your section?** As a member of several of the SOA sections, I have a great deal of appreciation for their contributions to our profession and being more deeply involved in one or more of the SOA sections is something that I've had an interest in for a while. Given my varied background and experience in the life and annuity industry, as an employee of both direct and reinsurance companies, I feel that I have a great deal of perspective to add to the Marketing and Distribution Section council.

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**Rebecca B. Scotchie, FSA,** Vice President, Product Management, Old Mutual Financial Network, Atlanta, GA
**Professional Background:** Currently, marketing, product development and pricing actuary leading company's efforts for indexed-universal life, indexed annuities, traditional annuities and immediate annuities. Previously, consulting actuary with focus on financial modeling, embedded and appraisal value development, and variable annuity pricing, valuation and modeling.
**Society of Actuaries Activities:** Contributed an article to *Product Matters* which was also used as examination material. Regular speaker at SOA meetings and conferences.
**Relevant Experience:** Sole focus over last two years has been on marketing and development in a leadership capacity. Served as a member of two Academy working groups: EIAWG, recently focusing on rule 151a, and ARWG, focusing on principles-based reserving for fixed annuities.
**Why are you interested in leading your section?** After serving on two working groups for the Academy, I realized that I can be very useful outside of my main employment. I enjoy being a part of a group aimed at furthering the interests of the industry. I am a natural leader and I look forward to and enjoy contributing to thought leadership.

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**H. Michael Shumrak, FSA, MAAA,** Senior Vice President, SCOR Global Life Reinsurance US, Dallas, TX
**Professional Background:** Top and bottom line responsibility for all of SCOR's non-conventional life reinsurance and direct writing business focused on strategic alliances, alternative distribution, new market or product support, and structured financial transactions.
**Society of Actuaries Activities:** One of the founders and the first chair of this section's predecessor, Non-Traditional Marketing Section. Frequent speaker and author on a range of strategic marketing and distribution topics. Author of the SOA Study Note on "Pricing Direct Response Marketed Products." Active member of Reinsurance Section's Research and Editorial Sub-teams leading POG for "Longevity Research."
**Relevant Experience:** Over 30 years of reinsurance experience including marketing, pricing, reporting and risk management for life, annuity and health products sold through agents, brokers, direct marketing and banks.
**Why are you interested in leading your section?** In the wake of the current financial crisis, we can provide thought leadership to make important contributions identifying and developing new product-distribution business models to more effectively meet market needs within acceptable risk boundaries in a capital efficient manner.