TAXATION SECTION

TAXATION SECTION COUNCIL

Kory J. Olsen, *Chairperson*	Steven C. Chamberlin	John J. Palmer
Christian J. DesRochers, *Vice-Chairperson*	Charla Jo Finley	Brian Prast
James F. Reiskytl, *Treasurer*	Peter A. Marion	

INSTRUCTIONS

Please vote for up to three candidates.
The top three candidates will receive three-year terms.
The fourth candidate will receive a two-year term.
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 Taxation Section as a council member?

Charla Jo Finley, FSA, Actuarial Director, Humana Inc, Louisville, KY
Professional Background: Financial reporting/valuation actuary with experience in health, life and annuities.
Society of Actuaries Activities: Tax Section Council 2008/2009; Friend of Council, Tax Section, 2007/2008; DMAC grader, 2009; contributed to the Tax Section of the Financial Reporting/Operational Risk fellowship module, 2006.
Why are you interested in leading your section? With health care on the political forefront, I believe it will be as important as ever to have health representation on the Tax Section council. I would work to build a relationship between the Health and Tax Sections and try to get more health coverage within the section's newsletter.

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George J. Hebel, Jr., FSA, MAAA, Consultant with the Tillinghast business of Towers Perrin, Dallas, TX
Professional Background: Specializes in issues affecting insurance companies in the U.S. and Canada involving life insurance company federal income tax, mergers and acquisitions, corporate strategy, financial reporting and reinsurance, sales practices and compliance, and expert witness litigation support.
Society of Actuaries Activities: Served on the Part 9 Exam Committee, 1983-1986; Regular participant at Society meetings; Tax Section Council Member, 2005-2006 and 2007-2008.

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Kristin Schaefer, FSA, MAAA, Actuary, AEGON/Transamerica, Cedar Rapids, IA
Professional Background: Corporate financial reporting actuary responsible for compiling and analyzing divisional information for quarterly and annual tax reserves, Blue Book and Green Book actuarial exhibits, Actuarial Opinion and Memorandum documents and reports.
Society of Actuaries Activities: Member of Financial Reporting Section since 2000 and Taxation Section since inception in 2004. Education & Examination Committee Interim Assessment grader 2008-present and DP-IU grader fall 2008. Taxation Section Annual Meeting coordinator 2009.
Relevant Experience: Volunteer with the following American Academy of Actuaries committees: PBA Review Subgroup of Regulatory Interface, Governance & PBA Review 2006-2007, Centralized Examination Office Team 2007, Valuation Manual Subgroup # 1 – Reporting Requirements 2007-2008; member of The ARC of East Central Iowa Finance Committee.
Why are you interested in leading your section? Since obtaining my FSA in 2007, I have become increasingly

involved in various activities of the Society and would like to continue my involvement by serving as a Taxation Section Council member. I am interested in becoming a member of the Section Council because I would like to expand on my work with the Council this year as the section's annual meeting representative. I have 15 years of experience working with life insurance company tax reserves that I would like to share by serving on the Council.

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Daniel Theodore, FSA, Consulting Actuary, Milliman, Inc., New York, NY
Professional Background: Milliman, 1997-present, varied clients and projects, primarily life insurance product issues. Prior to joining Milliman, I spent 12 years at two major mutuals involved in development, pricing and marketing support for variable, universal, term, and traditional life, and annuities.
Society of Actuaries Activities: Authored multiple articles in *Product Matters*, the Product Development Section newsletter. Panel Member and Presenter at SOA meetings: Denver, 2009: *Tax Issues in the Product Arena*; Phoenix, 2007: *Product Issues Among Small Companies*; Hollywood FL, 2006: *Incorporating Policyholder Behavior In Pricing Life Insurance*; Colorado Springs, 2002: *Update on Private Placement Market*; Washington D.C., 1997: *Variable Products-Pricing Issues*; Orlando, 1996: *Implementing the Illustration Regulation* (Coordinator and Moderator). SOA Exam Committee, 1991-1992, Writing and grading exam questions. Ongoing SOA Exam proctor.
Relevant Experience: Managed development of several products for which tax compliance was the driving issue in design, marketing, and administration. This requires keeping current on news about IRC sections 7702 and 7702A, both from a theoretical and practical viewpoint. President, Actuarial Society of Greater New York (ASNY), 2004-2005. Chairman and member, ASNY Continuing Education Committee. My writings have appeared in *Contingencies* and the *National Underwriter* Life/Health Edition.
Why are you interested in leading your section? I bring leadership experience in actuarial organizations, along with my interest and knowledge of insurance tax issues. My history demonstrates my commitment to volunteerism and the actuarial profession.

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Ame Biggart, FSA, MAAA, Senior Manager & Actuary, SMART Business Advisory & Consulting, LLC, Hartford, CT
Professional Background: Consulting actuary specializing in the federal income taxation of life insurance companies and products.
Society of Actuaries Activities: Presenter at the SOA sponsored Product Tax Seminar in 2008; contributor to *Taxing Times*, the newsletter of the Taxation section; member of numerous SOA sections including: Taxation, Financial Reporting, International, Investment, Joint Risk Management (SOA-CAS-CIA), Management & Personal Development, Product Development, Reinsurance, and Smaller Insurance Company.
Relevant Experience: Served for four years on homeowner's association board.
Why are you interested in leading your section? Utilizing my experience with life insurance company and product tax, I would like to assist the council in their initiatives. I have been a member of the Taxation Section since its inception in 2004 and enjoyed presenting at their sponsored Product Tax Seminar this past fall. I wish to become more actively involved in the section and feel that I possess the energy and experience that will benefit the council and am confident that I have much to offer the section in a leadership role.