

## MARKETING & DISTRIBUTION SECTION

### MARKETING & DISTRIBUTION SECTION COUNCIL

Steven E. Konnath, *Chairperson*

Keith A. Dall, *Vice-Chairperson*

Stephen M. Dobronyi, *Secretary/Treasurer*

Andy Ferris

Thomas P. Huber

Nancy A. Manning

Kevin J. Pledge

Chuck Ritzke

James A. Wiseman

#### INSTRUCTIONS

**Please vote for up to three candidates.**

**Ballots with four (or more) votes are invalid and will not be counted.**

**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:

For each section, the candidate who submitted his 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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**Michael L. Kaster, FSA, MAAA, MBA**, Senior Consultant, Watson Wyatt Insurance & Financial Services, Carmel, IN

**Professional Background:** Consulting actuary for last two years, prior to that, spent over 20 years working for Life Insurance Companies. Primary responsibility has been in product management and product development for individual life and annuity products.

**Society of Actuaries Activities:** Over the past several years, I have been involved in several industry and SOA committees and task forces, including:

- SOA Product Development Section Council (2004-2007), Secretary/Treasurer (2006-2007)
- SOA Business Skills Development Task Force (2004-2006)
- SOA Actuarial Practice Forum - Editorial Board Member (2005-2007)
- SOA Product Development Symposium planning committee (2006-present)
- SOA Marketing & Distribution Section (friend of the council) – (2007-present)
- Valuation Actuary Symposium planning committee (2008-present)
- Re-Focus Conference planning committee (2008-present)

In addition, I have written numerous articles and been a frequent speaker at SOA and other actuarial association events.

**Relevant Experience:** Prior SOA Section Council member for Product Development in 2004-2007.

**Why are you interested in leading your section?** From a professional perspective, my experience has been primarily in the area of life insurance company actuarial practices, including stints as Chief Actuary, Product Actuary and Valuation Actuary. My functional responsibilities have spanned from new product development, to new business development to reinsurance negotiations to financial reporting. During the past few years, I have become passionate about helping our profession flourish and prosper. The current dynamics of our profession have created many challenges for us, and we need leaders to be involved at various levels of the SOA to help our profession continue the success of our past. I have enjoyed my involvement in the section councils and I would welcome the challenge to continue to address these issues as a member of the section leadership. I

know the continuing education and research initiatives of each SOA section are critical in helping our profession. I welcome the opportunity to serve our members in this capacity.

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**Michael Koppen, FSA, MAAA**, SVP and Chief Actuary, Citi Assurance Services, Fort Worth, TX

**Professional Background:** Supporting products and services offered to credit union and bank customers; credit insurance, debt protection products, group term life, AD&D. Mostly U.S., some international.

**Why are you interested:** I believe I can add a fresh perspective to the operational and strategic issues that the M&D Section chooses to address.

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**Kevin Pledge, FIA, FSA**, President and CEO, Insight Decision Solutions, Toronto, ON

**Professional Background:** Mainly life and health experience, currently working for a software company that sells a business intelligence suite to software companies. This software includes marketing and distribution analytics and performance management.

**Society of Actuaries Activities:** Course 7 (Applied Modeling) Faculty, 1999-2006. Technology Section Council, 2005-2008 (Section Chair 2007-2008 year). Member of Marketing and Distribution Section 2007-2008 (one-year term to replace someone who was unable to continue for full term). Served on Annual Meeting coordination committee for 2006 (Technology Section) and 2008 (MaD Section). Moderated and presented at several meetings. Implemented MaD council portal to assist with the coordination of council meetings.

**Relevant Experience:** Presented at several meetings for other bodies including topics such as sales force regulation for Canadian Institute of Actuaries. Once managed a marketing department for an insurance company and was responsible for sales compliance.

**Why are you interested in leading your section?** I am currently serving a one-year term on the council and I would like to continue in this role for at least the full term to see current initiatives to fruition. I was originally interested because the Marketing and Distribution Section provides an excellent opportunity to apply actuarial disciplines to broader areas of insurance management.

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**Maria N. Thomson, FSA**, 2<sup>nd</sup> VP, Inforce Management, Hartford, MA

**Professional Background:** Specialize in mid-market products. Considerable product development experience covering direct response, association group, small group and bank distribution. Have been a Chief Actuary for a start-up mass marketing insurer. Authored the book, *Insurance Coverage for All!...and How Insurers Can Afford to Provide It*, which focuses on the need to use rapid underwriting and issue techniques in order to improve sales in the mid-market.

**Society of Actuaries Activities:** Founder of the Marketing and Distribution Section – formerly called the Non-Traditional Marketing Section. Served on the Council for two years. Was on the faculty for two consecutive “Faster, Better, Cheaper” underwriting seminars. Served as speaker or panelist for a variety of sessions relating to mid-market products and distribution.

**Relevant Experience:** Was a contributor to the joint SOA/AHIP publication “*Disability Insurance: A Missing Piece in the Financial Security Puzzle.*” Former columnist for the *National Underwriter* and writer of articles which have been published by Best’s, the Society of Actuaries, and LIMRA, among others.

**Why are you interested in leading your section?** I am very passionate about the need for the life insurance industry to change the way it does business in order to successfully sell in the mid-market. This passion led me to write and speak a great deal about my thoughts on this subject – up until three years ago. I have spent most of the last three years working on a start-up Independent Marketing Organization, RAD Insurance Holdings, Inc. (which is not yet a going concern). During this period, I largely dropped out of public industry activities in order to focus my energies on getting RAD off the ground. Now that I no longer have an operating role with RAD (I’m on the Board), I would like to reconnect with the broader actuarial and insurance community.

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**Jennifer Brady, FSA (2004), MAAA (2004)**, Life Product Actuary, New York Life Insurance Company, Tampa, FL

**Professional Background:** Life Insurance product development actuary specializing in the direct response market with additional experience in the traditional market, valuation for life and health.

**Society of Actuaries Activities:** Participated in Individual Life and Annuities U.S. and Canada Company/ Sponsor Perspective Examination Committee activities (2008).

**Relevant Experience:** Member of the Product Development Study Group

**Why are you interested in leading your section?** Techniques and practices change rapidly in today's environment as we all search for new methods to simplify and quicken the marketing and distribution process. Sharing our knowledge and experience with one another can lead to innovation greater than we could achieve alone. I enjoy interacting and sharing ideas with actuaries and look forward to doing so on a council that encourages such collaboration. With my seven years of experience in the direct response market, I believe I can contribute to the council's objectives.

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**Brian C. Evanko, FSA, MAAA**, Chief Actuary, CIGNA International Life, Accident, & Health, Philadelphia, PA

**Professional Background:** Currently oversee all actuarial functions for individual international LA&H business distributed primarily through telemarketing and other direct-marketing methods.

**Society of Actuaries Activities:** Member of the International, Marketing & Distribution, and Health Sections.

**Relevant Experience:** Extensive cross-functional experience working with internal and external marketing and distribution partners within International and domestic U.S. markets. Domestic experience was primarily in group healthcare business. Also, led CIGNA's actuarial development program for two years; this included recruiting and managing 75-member student program.