



SOCIETY OF ACTUARIES

Article from:

# The Independent Consultant

January 2003 – Issue No. 1

# Profiles of the Council Members



Carl Shalit

Carl Shalit, FSA (1976), MSPA, MAAA, EA.

Founder and president of Carl Shalit & Associates, Inc., an actuarial consulting firm located in Salem, Massachusetts.

Contact: [cshalit@juno.com](mailto:cshalit@juno.com)

**Major Fields of Professional Activity:**

Actuarial consulting to third party pension plan administrators.

**Society Activities:**

SOA/ASPA EA-2 Examination Committee, 1986-1992; vice-chairman, 1988-1990; chairman, 1990-1992; advisor to all enrollment examinations, 1992–present; The SOA Macrodemographic Model Project Oversight Group, 1995-present.

**Other Professional Activities:**

ASPA Board of Directors, 1989-1994. COP Task Force on Professionalism, 1990.

COP Task Force for the Implementation of the Professionalism Task Force Recommendations, 1991-1992.

ASPA Principles, Practices and Risk Management Committee, 1986-1991; chairman 1990-1991; ASPA Government Affairs Committee, 1995-present.

AAA Planning Committee, 1994; AAA Committee on Professional Responsibility, 1996-present; AAA Committee on Qualifications, 1997-present.

JBEA Advisory Committee on Actuarial Examinations, 1992-present; coordinator, 1997-present. Shalit has also written several articles for *The Pension Actuary* and is a frequent speaker on Professionalism at ASPA conferences. 🗣️

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Allen D. Booth, FSA (1973), MAAA.

Consulting actuary; former president, Liberty Bankers Life Insurance Company.

Contact: [abooth@execpc.com](mailto:abooth@execpc.com)

**Major Fields of Professional Activity:**

Life insurance and annuity product development, valuation and mergers & acquisitions

**Society Activities:**

Valuation Section member; Product Development Section member; former member—Education & Examination Committee; and Program Representative, SCF Section.

**Other Professional Activities:**

Wisconsin Actuarial Club member, past president. 🗣️



Allen Booth



Daniel P. Cassidy, FSA (1995), MAAA, EA.

President, Argus Consulting Limited, Concord, Massachusetts.

Contact: [danc@arguscl.com](mailto:danc@arguscl.com)

**Major Fields of Professional Activity:**

Cassidy leads a retirement consulting firm with clients in the United States, Canada and the United Kingdom whose practice focuses on the integration of benefits and assets to maximize value to plan sponsors and participants.

*Daniel Cassidy*

He has spoken several times at various conferences on the issues surrounding pension plans, including asset smoothing and fiduciary duty. He has also been published in Employee Benefit News, Mass High Tech, Pension & Investments, has been interviewed by Wall Street Journal radio and quoted in many other publications.

**Society Activities:**

Spring Pension Examinations Committee, Vice-Chairperson-Courses P-363 and P-461U, 1995-1999; Course 8 Retirement Benefits Education Objectives Committee, Chairperson, 1999-2002; Education and Examination Steering and Coordinating Committee, 1999-present ( Retirement Benefits, 1999-2001; Training, 2001-present); Retirement Systems Practice Advancement Committee, 1999-present; Organizing Committee—Smaller Consulting Firm Section, 2001-present; Meeting moderator, 2001; Meeting panelist, 1995, 1997, 1999 and 2001, Secretary and Treasurer, SCF Section.

**Other Professional Activities:**

Faculty, Bentley College—Pension and Employee Benefits Administration Program (Course: “Tax Aspects of Pension Plans”). Member, Investment Management Consultants Association. Panelist, Conference of Consulting Actuaries, 1997. 🗣️

George W. McCauslan, FSA (1977), MAAA, EA.

Independent consulting actuary, San Francisco, California.

Contact: [georgewmcc@aol.com](mailto:georgewmcc@aol.com)

*George McCauslan  
(not pictured)*

**Major Fields of Professional Activity:**

McCauslan is involved in consulting to small pension plans; expert witness and related services for marital dissolutions and other litigation; training for attorneys on handling pension; and other benefits in marital dissolutions.

**Society Activities:**

Chair, Organizing Committee for Smaller Consulting Firms Section 2001-2002; Education and Examination Committee—(Course 100 & 110 Committee 1979-1986, 1993-1996, vice chair 1984-85, Chair 1985-86; examination general officer, 1986-1990; education general officer, 1990-1991; F.A.C. facilitator 1994-present—program speaker, 1999; seminar speaker, 1988, Chairperson, SCF Section.

**Other Professional Activities:**

Program speaker, CCA Meeting, 1998; speaker for various pension and family law groups; San Francisco Actuarial Club, president, 1988-1990.

**Publications:**

Various articles for Family Law News (California State Bar Family Law Section) 🗣️

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*Ken Hartwell*

Ken Hartwell, FIA (1965), FSA (2000), MAAA.

Part-time consulting from home in Cumberland, Maine.

Contact: [gnubeest@maine.rr.com](mailto:gnubeest@maine.rr.com)

**Major Fields of Professional Activity:**

Life insurance (including annuities) and disability consulting. Hartwell has worked on the Hancock, Prudential and Principal demutualizations, and has over 40 years of varied actuarial experience. He retired from full-time work at the end of 2001.

**Society Activities:**

Prior to serving this Council to date, Hartwell has not been involved in SOA activities due to Academy involvement. Having been an ASA (by virtue of the FIA) since the 1970s, Hartwell was granted an FSA in 2000 under the new mutual recognition arrangements. He serves as Assistant Editor of the SCF newsletter.

**Other Professional Activities:**

Member of the Actuarial Standards Board since January, 1999; Served as Academy vice-president for professionalism, 1996-1998; member of the Academy's Committee on Professional Responsibility, from 1990-1995; and chair of the Academy's Committee on Professional Responsibility, 1992-1995. ☛

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Mitchell I. Serota, FSA (1983), MAAA, EA, FCA.

Contact: [actuary@miserota.com](mailto:actuary@miserota.com)

**Major Fields of Professional Activity:**

Serota is involved in defined-benefit pension plan consulting, self-funded group health consulting; expert witness; and QDRO preparation.

**Society Activities:**

Examination 9 committee member, 1984-1987; Examination 9 education coordinator, 1986-1987; speaker, 1983, 2000, 2001; lead workshop co-chair, 1989; Smaller Consulting Firm organizing committee, 2001; member of Pension and Health councils; intermittent member of Investment and International councils. He serves as Vice-Chairperson and Web Liaison of the SCF Section.



*Mitchell Serota*

**Other Professional Activities:**

Chicago Actuarial Association vice-president (Public Relations) 1980-1985.

**Publications:**

"QDROs with Fewer Hassles," Pension Section News, June 2001.

"Actuarial Considerations," Employee Benefits Law Handbook, Chapter 20, Illinois Institute for Continuing Legal Education, May, 1994.

"Government Health and Welfare Programs in the United States and West Germany," Benefits International, December, 1979, pp. 15-18. ☛



*Ian Duncan*

Ian Duncan, FSA (2002), FIA (1982), FCIA, MAAA.

**Major Fields of Professional Activity:**

Partner, Lotter Actuarial Partners, New York, NY. Consulting actuary since 1989. Consulting services to companies in the health, group and direct-marketing insurance sectors. Current areas of focus include health-risk management, claims-based underwriting and direct-marketing campaign management.

**Society Activities:**

Panelist and moderator, SOA meetings, 1988, 1999, 2002; contributor to SOA and Industry publications; “friend,” Non-traditional Marketing Section Council, SOA (1999-present). He also serves as Newsletter Editor for the SCF Section.

**Other Professional Activities:**

Panelist, Washington Business Group on Health, American Risk and Insurance Association; research associate, Healthcare Delivery Policy Program—Kennedy School of Government at Harvard University.

**Publications:**

“Benchmarking and Cost Control” in Janet R. Douglas: *Managing Workers’ Compensation*. John Wiley, 1994.

“Measuring the Total Cost of Lost Time” (with Jonathon Crane, Ph. D.) in Janet R. Douglas: *Managing Workers’ Compensation*. John Wiley, 1996.

“Population Risk Management” *Health Section News*, June, 2002.

“A Claims-based Prediction Model for Targeting members of Managed Care Organizations” (with Henry Dove, Ph.D. and Arthur Robb, Ph.D.) *American Journal of Managed Care* (forthcoming, 2003).

Population Risk Management: Reducing Costs and Managing Risk in Health Insurance.” (with Arthur Robb, Ph.D.). in Arnold Shapiro, ed. “Intelligent Techniques for the Insurance Industry” (forthcoming, 2003). 🗨️

Pamela L. Marlin, FSA (1995), EA (1992), MAAA.

Contact: [pam.marlin@mckeogh.com](mailto:pam.marlin@mckeogh.com)

**Major Fields of Professional Activity:**

Marlin is involved in Pension and Employee Benefits consulting and she serves as a consultant to the McKeogh Company in West Consohohocken, PA.

*Pamela Martin  
(not pictured)*

**Society Activities:**

Member, Course 8 Retirement Education Objectives Committee; pre-tester—EA examinations; member, Smaller Consulting Firm Organizing Committee; former vice-chair, fall pension examinations.

**Other Professional Activities:**

Speaker at Philadelphia Actuarial Club meeting, high school and college math classes. 🗨️

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*Marcus Robertson  
(not pictured)*

**Marcus A. Robertson, FSA (1990), FCIA (1990).**

Marcus Robertson is a partner of Robertson, Eadie & Associates in Oakville, Ontario. He has 23 years of pension consulting experience. Prior to his consulting career, Robertson spent over two years with a life insurance company.

Contact: [mrobertson@re-a.com](mailto:mrobertson@re-a.com)

**Major Fields of Professional Activity:**

All aspects of pension consulting, including the design, implementation and administration of both defined benefit and defined contribution pension plans. Assists clients in the establishment of their investment policies and in the selection of investment managers for their pension funds. Also has experience in both the wind-up of existing pension plans and the partial spin-off of plans after a sale. Has extensive valuation experience.

**Society Activities:**

General Officer, Education and Examination Committee; Member, Retirement Systems Practice Advancement Committee (CIA Liaison).

**Other Professional Activities:**

Frequent public speaker to industry groups and to employee groups on pension matters. Participated in the Canadian Bar Association-Ontario Annual Institute of Continuing Legal Education. Member, Canadian Institute of Actuaries' Committee on Liaison with Government Authorities on Pension and Social Security Matters. Member, Actuarial Advisory Committee for the Financial Services Commission of Ontario. Member, Association of Canadian Pension Management. 🗣️



SOCIETY OF ACTUARIES

475 N. Martingale Road | Suite 800

Schaumburg, Illinois 60173

Web: [www.soa.org](http://www.soa.org)