

RETIREMENT PRACTICE COMMUNITY

(Vote for up to four candidates)

Paul Donahue

Julian Robinson

Paul Angelo

Isaac Larbi

Zorast Wadia

Alan Wood

Paul Donahue, FSA, MAAA, CFA, JD
Assistant Vice President
MetLife
New York, New York

Professional Background

I have worked as an academic, health actuary, investment attorney and currently work as an actuary supporting employer-supported retirement products. I have published extensively on health care and retirement income funding in the United States and abroad in SOA publications and law journals. I am nearing completion of an LL.M in Taxation at NYU Law School.

Society of Actuaries Experience (Section and committee memberships and participation)

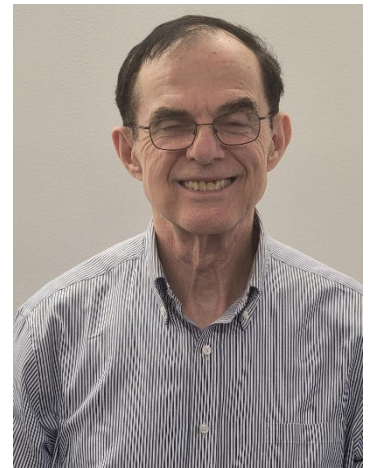
I am a member of the Retirement, International, Investment, Health and Social Insurance and Public Policy sections. I served as a member of the Investment Section Council and currently serve on the Retirement Section Communications committee. I have served on many Redington Prize juries and have contributed 17 articles to SOA publications relevant to retirement and social insurance.

Other Relevant Volunteer Experience:

Tutor in math and English to challenged high school students

Why are you interested in leading this Community?

I am deeply committed to effective, efficient and responsibly funded programs of health care and retirement income financing and believe actuaries can do more to educate the public and government officials on the array of choices available to meet those objectives.



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Julian Robinson FSA, MAAA, EA
CalPERS
Senior Actuary
Sacramento, CA

Professional Background

I have been working in the actuarial field since 1987, focusing mostly on the retirement plan space. As a Senior Actuary at CalPERS since 2012, I am involved with public sector retirement plans and all related issues.

Before joining CalPERS my experience was in the private sector:

- Retirement/pension plan consulting (Mercer)
- Mergers & Acquisitions Consulting (Aon Consulting)
- Corporate benefits management (ADP Inc. and Marsh & McLennan Companies)
- Insurance company management, product pricing and marketing group annuities (American General/AIG)



My [LinkedIn page](#) contains more information on my background

Society of Actuaries Experience (Section and committee memberships and participation)

I was elected to the Retirement Council in 2018 and served on the Council for 3 years. I continue to participate in Retirement Council discussions as a friend of the Council.

I was elected to the Social Insurance and Public Finance Council in 2022 and am currently serving on the council. I also serve of the council's subcommittee for Public Sector Pension Plans.

In the 1990s, I served on the Examination Committee for the Pension Track examination on International Benefits for a few exam cycles.

Other Relevant Volunteer Experience:

I currently am serving on the board of a charitable organization providing funds supporting the elderly. I also serve on the board of another Section 501(c)(3) organization which facilitates the establishment of endowments, donor advised funds and other charitable funding vehicles. Over the years I have been involved with fund raising for charity and other communal organizations.

I serve on the Finance Committee of the Homeowners Association at my residence in Sacramento, CA.

In my free time, I enjoy pursuing personal projects, working out at the gym, playing pickleball, keeping up with world events, politics, financial and economic news, and occasionally performing stand-up comedy.

Why are you interested in leading this Community?

Public sector pension plans are currently facing significant challenges. The financial condition of these systems is reported frequently in the press. More work needs to be done to better educate the stakeholders on the complex issues at hand, promote more in-depth discussions and develop more creative solutions. Since joining CalPERS, I have been engaged in these activities, mostly in California. I believe it is important for the Society of Actuaries in general, and the Retirement Practice Community in particular, to have a voice in all these areas. My election to this Community will ensure these issues remain an important focus of the Community.

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Paul Angelo, FSA, MAAA, EA, FCA
Retired
San Francisco, CA

Professional Background

Recently retired from over 40 years as a consulting pension actuary for corporate, multiemployer and public sector plans, most recently with Segal serving exclusively public sector plans.

Active and frequent presenter throughout my career, including SOA, AAA and CCA meetings and webinars, as well as those of industry associations.

Society of Actuaries Experience (Section and committee memberships and participation)

- Pension Section Council member circa 2000 including Chair of the Council in 2001-2002
- Social Insurance & Public Finance (SIPF) Council member and friend since 2014

Other Relevant Volunteer Experience:

- Founding Chair of the CCA Public Plans Community and its Steering Committee
Initiating project leader for both the 2014 CCA “White Paper” on model public pension funding policies, and its 2024 Second Edition
- Long and continuing service on the Planning Committees for the Enrolled Actuaries Meeting/Conference and the CCA Annual Meeting
- Currently completing second term on CCA Board of Directors, term ending October 2025
- Frequent volunteer on AAA committees and workgroups for Issue Briefs, Practice Notes, and Comment Letters for ASB and GASB Exposure Drafts



Why are you interested in leading this Community?

From the vantage point and access of the SIPF Section Council I have been following very closely the development of the SOA's new Community structure and let's just say it is both complicated and evolving. I am particularly interested in how pension and OPEB actuaries serving the public sector will be represented and supported in the new structure.

This will necessarily include how “Topic Subgroups” (essentially subcommunities) for public sector actuaries will evolve, and how the Topic Subgroup “Content and Engagement Work Group Liaisons” will work with the “Content and Engagement Work Group Manager(s)” selected from and by the Community Advisory Team (CAT, the thing I'm running for). As I said, it's complicated.

How this new structure will affect the volunteer experience is in my view the most important consideration before these new Community Advisory Teams. I believe my decades as a volunteer and thought leader within the SOA, the AAA and the CCA have given me experience navigating their various volunteer management structures, experience that could be crucially useful in helping determine how public sector pension and OPEB actuaries will thrive in this new SOA volunteer structure.

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Isaac Larbi, ASA, MAAA
Associate Actuarial Consultant
SEGAL
Washington, DC

Professional Background

I am an accomplished actuary with extensive experience in Pension and OPEB Valuation, Pension Risk Transfer valuation and Pricing, financial reporting, employee benefits consulting etc. Proven expertise in streamlining processes, improving financial accuracy and managing cross-functional projects. Proficient in industry-standard actuarial tools and methodologies with a strong commitment to delivering measurable results.

Society of Actuaries Experience (Section and committee memberships and participation)

I have been a member of the following sections of the Society of Actuaries:

- Retirement
- Actuary of the Future
- Financial Reporting
- Long Term Care
- Joint Risk Management (SOA - CAS - CIA)



Other Relevant Volunteer Experience:

Have been part of the leadership for my local church for many years and also have held many leadership positions in communities that I have lived in previously.

Why are you interested in leading this Community?

I am interested in the Retirement Practice Community because I believe my experience as a retirement actuary can be brought into great use for this community.

I believe this will provide an opportunity for personal and professional growth and will allow me to deepen my expertise, stay informed about the industry trends, and develop leadership skills.

My involvement in the retirement community will help influence the future direction of retirement practices and policies within the actuarial profession, contributing to the sustainability and effectiveness of retirement solutions.

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Zorast Wadia, FSA, MAAA, EA
Milliman
New York, NY

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Alan Wood, ASA
Sammons Financial Group
West Des Moines, IA

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