

## **INVESTMENT AND RISK MANAGEMENT COMMUNITY**

*(Vote for up to four candidates)*

Ryan Manheimer

Ian Genno

Daniel Jury

Larry Zhao

Hongjuan Zhou

Nicholas Jacobi

**Ryan Manheimer, FSA**  
**AVP**  
**Fortitude Re**  
**Jersey City, NJ**

### **Professional Background**

I work on life and annuity reinsurance transactions at Fortitude Re, bringing an enterprise risk management perspective to structuring and execution. My experience spans a wide variety of US and Japanese deals involving asset-intensive reinsurance to US or Bermuda-domiciled entities. Previously, I held a range of roles at Prudential Financial through the CIO Analyst and Actuarial Leadership Development Programs, culminating in a position within Insurance Risk Management.

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

- Member, Investments and Joint Risk Management sections
- 3rd place, 2024 Investment Section Asset Allocation Contest (Alpha Category)

### **Other Relevant Volunteer Experience:**

- Board Member, Homeowner's Association (2022-2023)
- Co-Chair, Community Service Subcouncil of the Actuarial Leadership Development Program
- Mentor to actuarial students and early-career professionals



### **Why are you interested in leading this Community?**

I see Community Advisory Team leadership as a meaningful way to give back to the profession and help shape its future—particularly in emerging or evolving areas like asset-intensive reinsurance that are increasingly important for actuaries today.

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**Ian Genno, FSA, FCIA, CERA**  
**Strategic Advisor, Financial Sector Policy**  
**Department of Finance, Canada**  
**Toronto, Ontario**

**Professional Background**

I am a seasoned leader in risk management, with a unique combination of private and public sector experience – having worked as a trusted advisor to the senior management and boards of companies across a range of industry sectors and geographies, as well as in leadership roles in financial sector policy, regulation and supervision.

I am currently working with the Department of Finance (Government of Canada), as a strategic advisor on financial sector policy initiatives – bringing industry, regulatory, actuarial and risk management perspectives to the table, and providing strategic advice to senior decision-makers on key policy files. Prior to this opportunity, I served in leadership roles with OSFI (the federal banking and insurance regulator in Canada) – contributing to initiatives in housing finance / mortgage risk; climate risk; crisis readiness and response; identifying and assessing emerging risks; and developing capital standards.



Before moving to the public sector, I was a partner in a leading global professional services firm, advising public and private sector clients in Canada and abroad on a range of actuarial, risk management, financial and human resource issues. I've been responsible for developing and leading client relationships, intellectual capital and people.

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

Since earning my Fellowship, I've served in a broad range of roles in the SOA – and feel honoured to have received an Outstanding Volunteer Award, and the President's Award. My SOA experience includes:

- Two terms on the Board of Directors;
- Leadership roles with responsibility for strategy, governance, risk management, research, and marketing;
- Contributing on three different Section Councils (including as chair / co-chair of two); and
- A strong track record for building and motivating new teams – either to bring a fresh perspective on existing processes, or to tackle new priorities.

The latter point on building and motivating new teams may be especially relevant, as we launch the new Investment and Risk Management Community. I hope to leverage my hands-on experience working with colleagues to get new SOA initiatives off the ground – including as the founding chair of the Research Executive Committee, Marketing Executive Committee, and General Insurance Research Committee, and co-leading the launch of the SOA's Catastrophe and Climate Research Program.

**Other Relevant Volunteer Experience:**

I'm committed to helping develop the next generation of risk management professionals – serving on the University of Toronto's Actuarial Science Program Advisory Board, and also as an Adjunct Professor teaching a fourth year actuarial science course and a graduate course on risk management.

I'm also committed to contributing to help others within my community – having served on the Board of Directors of an organisation providing counseling and treatment services for women with substance abuse and gambling problems, and their families; and finding personal ways to help others less fortunate in the community.

I feel honoured to have received an Ontario 25 Year Volunteer Service Award, for continuing dedication and commitment as a volunteer.

**Why are you interested in leading this Community?**

Like many of you, I feel that volunteering within the SOA gives each of us a chance to give something back – to the profession that has opened so many doors for us in our careers.

Dedicating a portion of my free time for SOA volunteer leadership roles offers opportunities to contribute to key initiatives for the profession, and to remain at the forefront of current developments and emerging thinking globally in actuarial practice and risk management.

With the Investment and Risk Management Community now launching, I'm excited by the prospects of what we can achieve. I hope to bring unique perspectives and experience to the table, to contribute to its success. Just as important, will be for me to listen and learn from others in the Community – I certainly don't have all the answers.

From a personal perspective, I'd welcome your support in this month's Community election. But more importantly, casting your vote for any of the candidates – all of whom will bring something valuable to the table – will serve our Community (and the SOA) well.

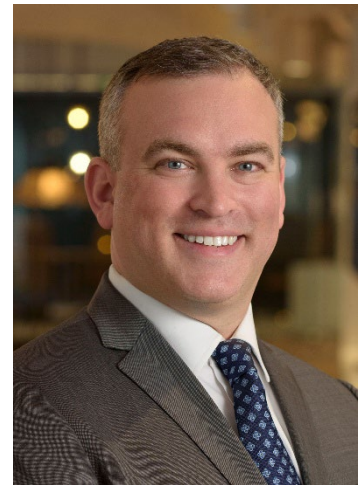
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**Daniel Jury, FSA, CFA**  
**Client Strategist**  
**Legal & General**  
**Chicago, IL**

### **Professional Background**

Dan's career as an actuary spans a diverse array of industries, including investment management, consulting, insurance, and corporate treasury. Currently Dan is a Client Strategist with Legal & General Asset Management, leading client relationships and designing custom solutions for Liability-Driven Investment and other investment strategies. Prior to that, Dan led the global benefit investments, de-risking, and cost-savings initiatives for Kraft Heinz's \$15bn global retirement plans. In this role, he served on the firm's investment committee, benefit fiduciary committee, and various retirement plan trustee boards in the UK and Canada. Dan also worked as an actuarial consultant for WTW and Aon in their retirement practices, leading large client engagements across a variety of topics, including valuations, modeling, and cash & investment strategy.

Dan earned a BA in Mathematics from Washington University in St. Louis and an MBA from Yale University. Dan is a Fellow of the Society of Actuaries, a CFA charterholder, and holds a Series 3 license registered with the NFA.



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

I have volunteered with the SOA a number of times over the past two decades, including helping oversee SOA research as a member of a Project Oversight Group, serving on an FSA exam committee, and supervising preliminary exams. I am also a current/former member of the following sections: Investment, Joint Risk Management, Retirement, and Leadership & Development.

### **Other Relevant Volunteer Experience**

My other volunteer experience includes a variety of roles supporting sick children and people experiencing homelessness.

### **Why are you interested in leading this Community?**

Being part of the Investment and Risk Management Community Advisory Team is an important way for me to help set the path forward in our field at this critical juncture. We all have a vested interest in ensuring that our profession remains on the forefront of the rapidly-evolving professional and technical landscape, and my diverse experience allows me to draw from a variety of perspectives in helping optimize our learning and engagement strategy. By advocating for ways for us to leverage the emerging power of AI while also maintaining our critical actuarial knowledge and oversight, I can help ensure our community will continue to thrive in the future and preserve the trust and financial stability actuaries have secured for society for centuries.

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**Larry Zhao, FSA, CERA, CFA, FRM, Ph.D.**  
**Head of Quants, Global Investments**  
**Reinsurance Group of America**  
**Chesterfield, MO**

**Professional Background**

An investment and risk executive with 20 years of professional experience in actuarial, financial modeling, investment and capital management, hedging, derivatives trading, and technology, I am currently Head of Quants, Global Investments at Reinsurance Group of America. Prior to RGA, I was Lead Director, Head of Actuarial Hedging and Strategies at Equitable in NYC for 8 years. Prior to Equitable, I worked for three other insurance companies, in the Market Risk Management of Nationwide Insurance from 2012 to 2015, in Unum Investments from 2009 to 2012, and in ING Financial Services and in ING Bank from 2004 to 2006. I also worked in the High Frequency Option Trading team at Susquehanna International Group in Philadelphia from 2006 to 2009.



I graduated from the University of Pennsylvania with a Ph.D. in Computer Science, specialized in Human Modeling and Simulation through Artificial Intelligence and Machine Learning, and from Peking University with a Bachelor of Science and a Master of Science, both in Computer Science. Besides the FSA and CERA actuarial credentials, I am also qualified as Chartered Financial Analyst (CFA), Financial Risk Manager (FRM), and Certified Market Technician (CMT).

My diverse background and experiences have prepared me to have a comprehensive understanding of not only traditional fields such as life & annuity, reinsurance, disability & LTC, and risk management, but also non-traditional fields such as hedging, asset management, derivatives trading, banking, AI, and technology. My broad experience offers unique perspectives for the SOA to cultivate and grow the next-generation actuaries in a rapidly changing and competitive world.

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

After becoming an FSA in 2011, I have been volunteering for the SOA continuously for 14 years, spanning across many committees and functions in various leadership positions, such as

- Chair/Vice-Chair of the Investment Section (2013-2015)
- Editorial Board member of The Actuary magazine (2015-2018)
- Vice Chair for the Examination Committees of Quantitative Finance & Investment (2011-present)
- Vice Chair of the ERM committee (2012-2013)
- Vice Chair of the Corporate Finance Curriculum committee (2013-2014)
- Program Chair of 2016 Investment Symposium
- Program Vice-Chair of 2017 Investment Symposium
- one of the SOA Outstanding Volunteer Award Winners in 2015
- Best presentation award winner at the 2017 Investment Symposium

All these volunteering work gave me the real experience to learn how to build and sustain collegial and collaborative relationships with leaders, volunteers, and the SOA staff, to understand people and appreciate different viewpoints, to be cognizant of the challenges and the intricacies of communicating with stakeholders to build rapport and reach consensus, to pool resources and talents together to effectively implement team decisions and achieve the best practical results.

Not only a team player and a consensus builder, I am also an independent, forward-looking, strategic thinker, having published articles in the SOA newsletters and magazines. For example, in an SOA published e-book, I wrote a thought-provoking paper, titled "Bitcoin Fallacies," demystifying misconceptions and advocating Bitcoin in 2014 when it was still below \$700. The paper made it to the final round, though it didn't win the prestigious Redington Prize in 2015. I also wrote an editorial titled "Global low interest rates: Hypotheses, implications and strategies" in The Actuary in 2015.

**Other Relevant Volunteer Experience:**

N/A

**Why are you interested in leading this Community?**

Joining the leadership of the Investment & Risk Management community provides a venue for me to collaborate with a wider group of actuaries across geographic regions and practices, to share views and hash out solutions for the challenges facing the actuarial community today, arising not only from Data Science and Predictive Modeling but also from AI, significantly impacting the future of actuaries as a profession. My educational and professional background give me a unique angle and perspective to provide valuable opinions to the continuous growth and potential strategic pivot.

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**Hongjuan Zhou, ASA, Ph.D.**  
**Professor of Practice**  
**Arizona State University**  
**Tempe, AZ**

### **Professional Background**

As a faculty member in the School of Mathematical and Statistical Sciences at ASU, I am dedicated to advancing actuarial education and strengthening the pipeline of future actuaries. I teach a broad range of actuarial courses and mentor both undergraduate and graduate students in their academic and professional growth. I conduct high-quality research and present at professional conferences. Additionally, I perform applied research that addresses problems arising from practice and foster connections with actuarial organizations and the insurance industry.



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

I have participated in activities organized or sponsored by the SOA, including serving as a faculty adviser for the SOA Student Research Case Study Challenge and presenting at the SOA health meeting and actuarial research conferences.

### **Other Relevant Volunteer Experience:**

N/A

### **Why are you interested in leading this Community?**

I would like to take an active role in the community to stay on top of risk management trends and help solve emerging challenges in practice. Through my engagement in this community, I hope to contribute by supporting innovative research, fostering collaboration, and sharing valuable knowledge that advances the risk management field and benefits the profession.

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**Nicholas Jacobi, FSA, MAAA, CERA**  
**Mutual of Omaha**  
**Bethlehem, PA**

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