

TAXATION

(Vote for up to two candidates)

Yaohua (Aria) Zhou

Philip Ferrari

Yaohua (Aria) Zhou, ASA
Tax Actuary
Symetra Life Insurance Company
Chicago, IL

Professional Background

I'm currently working as the tax actuary at Symetra Life Insurance Company, actively following legislative updates on various product tax and company tax issues. Prior to joining Symetra, I was with EY for 6 years, leading several tax reserve audits and model conversion projects.

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

I became the friend of tax council since last November and am currently actively participating on some volunteering work (e.g. writing for the Taxing Times and speaking at tax sessions).

Other Relevant Volunteer Experience

I am also a volunteer to MAAA Tax Working Group.

Why are you interested in leading this section?

While talking to some of my colleagues/friends who are not working with tax closely, I noticed that a lot of them tend to overlook some of the tax issues and also find some of the tax related accounting concepts are difficult to understand. Especially when it comes to planning projection models, tax-related calculations are often simplified. On the other hand, my friends from tax accounting at insurance companies often find insurance related concepts hard to decipher. I was hoping to promote more tax awareness and develop more materials to bridge the gap between actuaries and accountants through the Tax Section.



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Philip Ferrari, ASA, MAAA
Managing Director
Ernst & Young LLP
Hartford, CT

Professional Background

I am a Life Actuary who has spent nearly 25 years supporting life and annuity companies in their technical and operational needs, particularly around insurance product tax compliance with Internal Revenue Code Sections 72, 7702, 7702A, and other tax compliance matters, including various global tax reporting regimes such as US FATCA.

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

I have enjoyed spending time volunteering over many years for various SOA sections and events, including being an active member of the Smaller Insurance Company and Taxation Sections. I have previously been a council member for the Taxation Section and have spent the last few years as a friend of council. In these roles, I supported various needs of the section including meetings coordinator, speaker for tax sessions, and being an overall active member and participant of monthly section and planning calls. I was co-chair multiple times for the SOA's Product Tax Seminars held over the years, including for the upcoming seminar to be held in the Fall 2021.



Other Relevant Volunteer Experience

None

Why are you interested in leading this section?

I would like to continue not only supporting and volunteering for the SOA, but being an active participant of the Taxation Section, however extending my role once again to being more directly involved as a council member. I want to help the section plan, grow and continue to serve its membership in the exceptional way it has over the years.

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