Retirement

(Vote for up to four candidates)

Jamie Sloat

Jeff Passmore

Alicia Traviss

Jeff Williams

Jamie Sloat, FSA, EA, FCA

Principal
Mercer
Denver, CO

Professional Background
Jamie is a Principal in Mercer's Denver office and a retirement consultant for the Wealth business in the US.

As a consultant, Jamie has worked closely with multinational mining companies, government contractors, and hospitals. She has been involved in global accounting coordination with actuaries abroad, performed nondiscrimination testing, developed tools to assist her clients with administering their plans, led employee education sessions, and helped clients to redesign defined benefit and defined contribution programs.

Jamie has a unique background, working with both small and large employers to design programs covering anywhere from 1 to 25,000 employees. Additionally, Jamie has experience working as a plan administrator, where she led the Retirement Administration in-house for a multinational employer. Prior to pursuing consulting, Jamie was the Advanced Mathematics Leader for the Leander Independent School District in Texas. In addition to creating curriculum and leading classrooms, Jamie worked at the district level to design a distance learning program that would allow students from outside the school to join classes that would otherwise be unavailable to them.

Jamie is an Enrolled Actuary with the Joint Board for the Enrollment of Actuaries, Fellow of the Society of Actuaries, and a Qualified Pension Analyst and Qualified 401(k) Administrator with the American Society of Pension Administrators and Actuaries.

Society of Actuaries Experience (Section and committee memberships and participation):
- Member of the Retirement Section
- Secretary, Retirement Section Council (mid-term 2022 replacement for a leaving member)

Other Relevant Volunteer Experience
- Cherie Blair Foundation for Women, Business Mentor, Nov 2017 – January 2019
- Mile High Lab Rescue Mission, Foster, 2022

Why are you interested in leading this section?
I am running for leadership in the Retirement Section Council to contribute to the development for section members and learn more about inner workings of the Retirement Section within the SOA. I am hoping that I can not only give something back, but learn something in return.

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Jeff Passmore, FSA, MAAA, FCA

Actuary and Liability Strategist
MetLife
Dallas, TX

Professional Background

Jeff Passmore is a Lead Pension Liability Strategist for the Long Duration and LDI team at MetLife Investment Management (MIM). He is a credentialed pension and investment actuary and serves as the pension specialist on the MIM team.

Jeff joined MIM in January of 2022. Prior to joining MIM, he worked on the long duration teams at Barrow Hanley Global Investors (BHGI) and at Standish Mellon. In these roles, he created custom pension liability indices, provided asset/liability reporting, designed pension liability hedging overlay strategies and performed asset/liability studies for the firms' clients, including public and private defined benefit plans, insurance companies, funded retiree medical plans and state prepaid college tuition programs.

Before working to create pension hedging strategies in investment management, Jeff was a consulting pension actuary and was the retirement practice leader of the Texas offices for two global pension consulting firms. Jeff has 31 years of pension industry experience.

Jeff received a Bachelor of Science degree in mathematics from the University of Texas in Austin. He is a Fellow of the Society of Actuaries, a Member of the American Academy of Actuaries, a CFA® charterholder and the two-time past chairperson of the Investment Section of the Society of Actuaries.

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

- Two, one-year roles as Chairperson of the Investment Section Council
- Investment Section Council member, three-year term
- Two, one-year roles as Chair of the Continuing Education Committee of the Investment Section
- Chair/Emcee of the Investment Symposium (the Annual Meeting of the Investment Section)
- Presenter at numerous SOA Annual Meetings and SOA Investment Symposiums on topics at the intersection of pensions and pension hedging strategies
- Presenter and facilitator for several professional development webcasts including three professionalism webcasts
- Representative of Investment Section at SOA Council Leadership Forum
- Two-time judge for the Redington Award (bi-annual award for outstanding actuarial research paper with investment application)

Other Relevant Volunteer Experience

- Diversity and Inclusion volunteer group at prior employers, focused on diversity in recruiting and effective workplace inclusion for interns and new campus hires
- Exam study mentorship program volunteer and leader at prior employer, focused on teaching student actuaries effective study and exam taking techniques
- Mentoring program volunteer at two prior employers, helping associates successfully navigate career and promotion challenges

Why are you interested in leading this section?

- I have been and continue to be a strong believer in and advocate for our professional community of pension actuaries and I want to continue to give back to this community.
- I understand and believe in the role of the professionalism sections of the SOA.
- I believe that making a difference as a section council member requires devoting significant time and energy to the role.
- I have demonstrated my willingness to commit extra time and effort, beyond the requirements of section council membership.
- I established a reputation for collaborative participation in the section council, working effectively with fellow council members and SOA staff.
- I have a strong track record of recruiting others to section membership and section leadership.

- I enjoy contributing creatively to sections as a council member and have demonstrated this including developing the “How I Became an Investment Actuary” podcast series and developing and implementing the Double for Five initiative that sought to double the value of membership in the Investment Section.

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Alicia Traviss, FSA, EA, MAAA, FCA

Consulting Actuary
Athena Actuarial
Minneapolis, MN

Professional Background

I am a Retirement Actuary with over 20 years of experience as an actuarial consultant to private and public sector employers as well as a multiemployer plans, with an emphasis on the valuation and analysis of qualified and non-qualified pension and retiree medical plans. My extensive experience includes performing funding and accounting actuarial valuations, assisting clients with their benefit plan administration, communicating benefits to employees, implementing benefit increases, designing and costing out plan designs, presenting at board meetings and executing all aspects involved with terminating a pension plan. I have also actively served at my employers as the Retirement Training Lead, National Exam Coordinator and co-authored company surveys and publications.

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

I am an active grader with the SOA and a member of the Retirement Section.

Other Relevant Volunteer Experience

I volunteer as a Water Polo Coordinator for a summer league overseeing a staff of 6 coaches and 40 players ages 8 to 14. Active volunteer at my children’s schools. Facebook administrator for two community sites overseeing a total of 1,400 members.

Why are you interested in leading this section?

I have volunteered extensively in the past in non-professional roles. The last few years have been a time of reflection for me and I realized I would like to be more involved from a professional volunteering standpoint. I have held many roles at my employers, but look forward to widening my network and broadening my perspective. I also would like to help influence the retirement actuarial community and ever changing professional landscape.

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Jeff Williams, ASA, EA, MAAA, FCA

Vice President and Consulting Actuary
Segal
Atlanta, GA

Professional Background

I have worked in the pension actuarial field going on 25 years, primarily focusing on public sector defined benefit plans. I also work some on multiemployer plans, and my first 5.5 years in the actuarial profession were spent working on corporate pension plans. Areas of focus include actuarial valuations, GASB 67/68, experience studies, funding strategies, plan redesign, cost studies, and deterministic projections.

Society of Actuaries Experience (Section and committee memberships and participation):
Retirement Section member

Other Relevant Volunteer Experience
Treasurer of elementary school Foundation, Treasurer of Homeowners Association, assist with needs of high school softball team, coach of numerous youth sports teams

Why are you interested in leading this section?
To gain a better understanding of, and to assist in the challenges facing, pension actuaries.

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