

TAXATION

(Vote for up to two candidates)

Stefanie J. Porta

Syed Ali Murtaza Hasan

Stefani J. Porta, ASA, MAAA
Senior Actuarial Consultant
Davies Insurance Services
Palm Harbor, FL

Professional Background

Stefanie Jo Porta, ASA, MAAA is a Senior Consulting Actuary for Davies Insurance Services, providing consulting expertise in a wide variety of life insurance product lines. She assists with all aspects of product line management ranging auditing to product development, modeling, Illustration actuary testing, product administration, valuation, expert witness services, and experience studies. She is the Appointed Actuary for a small insurance company. With over 40 years of experience, her most recent previous experience was with Tata Consultancy Services Ltd as an Associate Actuary providing product experience for administrative system conversions, and with Sagicor Life Insurance and Transamerica Life Insurance as a Valuation Actuary.



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

- Smaller Insurance Company Section Council (two terms including Chair and Vice-Chair)
- Webcast Coordinator for Smaller Insurance Company Section
- Frequent Panelist and Moderator at the SOA Valuation Actuary Symposium and the SOA Annual Meeting
- Presenter for Year-End U.S. Statutory Financial Reporting Considerations Webcasts and PBR Webcast series
- Project Oversight Group Chairperson for PBR Simplified Methodologies
- SOA Valuation Actuary Symposium Planning Committee

Other Relevant Volunteer Experience

- Treasurer, Church Council
- Northern Arizona University Alumni Volunteer at High School Award Ceremonies

Why are you interested in leading this section?

Becoming a Friend of the Taxation Section and the Smaller Insurance Company and later serving on the Smaller Insurance Company Section Council has been one of the most enjoyable and rewarding experiences I have had. I have been involved with life insurance taxation since TEFRA was enacted and have always enjoyed the work. The actuarial profession has always encouraged education among members through teaching one another. Our growth comes from actuaries teaching other actuaries, sharing ideas, thoughts, research, and techniques. The section councils are the glue that hold it together. There are a variety of ways to serve, and I look forward to the opportunity of helping and encouraging others to contribute.

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Syed Ali Murtaza Hasan, FSA, CERA
Vice President - Finance
Wilton Re
Norwalk, CT

Professional Background

Ali is Vice President at Wilton Re, where he currently leads the embedded value function and assists in analyzing and reporting the company's performance. He has worked in varied roles in his 12+ years in the insurance industry, including consulting, pricing, valuation, corporate planning etc. Ali graduated from the University of Waterloo in 2008 with a B. Math in Actuarial Science. He is a Fellow of the Society of Actuaries and a Chartered Enterprise Risk Analyst.



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

None

Other Relevant Volunteer Experience

None

Why are you interested in leading this section?

Taxation is one of the important levers in the pricing of insurance products/transactions. I would like to personally learn more about the topic, educate others, and be actively involved in the current developments in this area.

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