

2023 Life Meeting

The Society of Actuaries would like to thank the all the presenters at the 2023 Life Meeting for their outstanding contributions to this year's event.

Session 1A: Life Happens - Life Product Update

- Donna Christine Megregian FSA, MAAA
- Timothy C Pfeifer FSA, MAAA

Session 1B: In Plan Annuities in Light of Secure Act 1.0/2.0

- Kendrick D Lombardo FSA, MAAA

Session 1C: National Association of Insurance Commissioners (NAIC) Current Events - An Update from the American Academy of Actuaries

- Donna R Claire FSA, MAAA, CERA
- Linda M Lankowski FSA, MAAA
- Craig D Morrow FSA, MAAA, CERA

Session 1D: Current Trends in Life Industry Mortality and Lapse Data

- Boyang Meng ASA, MAAA

Session 1E: Creating a Service-Oriented Organization to Improve Organizational Efficiency

- Ian S Ehrlich FSA, CERA, MAAA
- Bryon Robidoux FSA, MAAA, CERA

Session 1F: Is There a Need for a Chief Liquidity Officer?

- Tamara Burden FSA, MAAA, CERA
- Michael Epstein
- Saku Nousiainen
- Michelle Teng

Session 1G: Diversity 101 and Creating an Inclusive Environment

- Beth Gall
- Nakia Green

Session 1H: Managing Annuities in a Rising Interest Rate Environment

- John Joseph Balbach Jr. FSA, MAAA
- Guillaume Briere-Giroux FSA, MAAA
- Paul Song FSA, CERA, FCIA

Session 2A: Annuity Market Update

- Nicholas E Carbo FSA, MAAA
- Michelle Souza

Session 2B: The Multiverse of IUL

- Andrew John Berger FSA, MAAA
- Seth Joel Detert FSA, MAAA
- Steven J Ferrara FSA, MAAA
- Richard John Hoffer FSA, MAAA

Session 2C: Matters of Life and Death - Mortality Research Update

- Kathryn Julia Eubank FSA, MAAA
- Peter J Miller ASA, MAAA
- Mark Spong FSA, CERA, MAAA

Session 2D: Is Your New Business Profitable?

- Markus Coombs FSA, MAAA
- Mark Stephen Mennemeyer FSA, MAAA
- Matthew Scott Parent FSA, MAAA
- Mark J Scanlon FSA, FIA, MAAA, CERA

Session 2E: Market Analysts Perspective on LDTI Impact & Early Results

- Vance Lee Forrest FSA, MAAA
- Ryan Krueger
- Alex Scott

Session 2F: ALM is Back on the Menu Again

- Michael L Kaster FSA, MAAA
- Craig Anthony Michaud FSA, MAAA

Session 2G: The Importance and Value of Work Product Technical Reviews

- Cheryl G Angstadt FSA, MAAA
- Michelle A Brown FSA, MAAA
- Andrew Davis ASA, MAAA
- Angela Marie Schwendeman FSA, MAAA

Session 2H: Actuarial Transformation, Innovation in Underwriting

- Benjamin J Hanley FSA, MAAA
- Gene Paul Del Castillo San Valentin FSA, CERA, MAAA
- James Timmins

Session 3A: Not So Simple: Final Expense Trends and Best Practices

- Nathan John Hill FSA, MAAA
- Jean-Sébastien Ledoux ASA, ACIA
- Brian A Sibley FSA

Session 3C: Mortality and Lapse in a Post-COVID World

- Houston Perrett FSA, CERA

Session 3D: Impact of Covid-19 on Mortality and Modeling

- Mark Spong FSA, CERA, MAAA
- Larry N Stern FSA, MAAA
- Ronora E Stryker ASA, MAAA

Session 3E: Bermuda Outlook and Current Trends

- Hillary Chen ASA, MAAA
- Thomas Girulis
- Antony Moyalan ASA

Session 3F: SWOT Analysis of Life Insurance/LTC Combo Product

- Robert T Eaton FSA, MAAA
- Jeffrey D Koll FSA, MAAA
- Michael William Mazur
- William Gus Mehilos FSA, MAAA

Session 3G: Comparison of Productivity and Efficiency on Certain Insurance-Based Use Cases

- Yun-Tien Lee FSA, MAAA
- Alec Loudenback FSA, MAAA

Session 3H: Data Ethics and Your Algorithms

- Nicholas Scott Hanewinckel FSA, CERA, MAAA
- Amber Ruiz FSA, MAAA

Session 4A: The 3 Ms of Inforce Management: Measure, Manage and Maximize

- Nik Godon FSA, FCIA, MAAA
- David Hopewell FSA, MAAA
- Amanda Hug FSA, MAAA

Session 4B: Diving Into Illustrations Workshop

- Seth Joel Detert FSA, MAAA
- Donna Christine Megregian FSA, MAAA

Session 4C: Aspects of Fixed Indexed Annuity (FIA) Market Risk Benefits (MRB) Valuation

- Michael J Lesar FSA, MAAA
- Andrew McCray FSA, MAAA
- Ricardo Trachtman FSA, MAAA

- Karthik M Yadatore FSA, MAAA

Session 4D: US Mortality Improvement Trends

- Justin A Fountain ASA, MAAA
- Carrie Lee Kelley FSA, MAAA

Session 4E: U.S. Insurance Climate Risk Disclosures is Not Near.... it's Here!

- R. Dale Hall FSA, MAAA, CERA
- Brian Hinkle FSA
- Michal Ryduchowski FSA, MAAA

Session 4F: Low-Code Solutions as an Option for Transforming Actuarial Processes

- Daniel Dvorin FSA, MAAA
- Nicholas Farber ASA

Session 4G: Bermuda Regulatory Changes and Industry Trends for Reinsurers

- Logan R Blake FSA, MAAA
- Clayton Chuah FSA, FCIA, CERA
- Nina Coetzer
- Steffin Du Preez
- Archbold Muhle

Session 5A: RILA Pricing Trends

- David Joseph Elliott FSA, CERA, MAAA
- Kendrick D Lombardo FSA, MAAA

Session 5B: How Actuaries Must Adapt to the Changing Landscape of Underwriting

- Sean J Conrad FSA, MAAA
- Ryan LaMar Holt FSA
- Jason A Jump FSA, MAAA

Session 5C: InsurTech and Life Insurance: What's New?

- Stephen S Cameron FSA, MAAA
- Blake A Hill FSA, FCIA
- Dror Katzav

Session 5D: AG 53 - A Look Back and What Lies Ahead

- Craig C Chupp FSA, MAAA
- Pat Cieslinski
- Yuxin Guo FSA, MAAA, CERA
- Dana N Hunt FSA, MAAA
- Lee William Richert FSA, MAAA

Session 5E: Multi-GAAP Reporting: An Innovative Approach to Understanding Insurance Results

- Nicholas Kinrade
- Werner Matula
- Markus Seifert

Session 5F: Honey, I blew Up the...Interest Rates? Considerations for Valuation and Product actuaries in a High Interest Rate Environment

- Seng Siang Goh FSA, MAAA
- Alexander Tall FSA, MAAA
- Chris Whitney FSA, MAAA
- Chris Whitney FSA, MAAA
- Gabriel Wittenberg FSA, MAAA

Session 5G: Difficult Conversations

- Tamora A Kapeller FSA
- Rebecca B Scotchie FSA, MAAA
- Ariel Weis FSA, MAAA, FCIA

Session 5H: Working Magic with Open “Sourcery”

- Robert Franquet FSA, MAAA, CERA
- Nicholas Scott Hanewinckel FSA, CERA, MAAA
- Matthew Kevin Heaphy FSA, MAAA
- Michael W Santore FSA, MAAA

Session 6A: Implications of Rising Interest Rates on FA and FIA Experience

- Kramer Gage Howell FSA, CERA
- Houston Perrett FSA, CERA
- Morgan Poropatic ASA

Session 6B: The New Norm: Equity Under IFRS 17

- Ryan Morris Colerick FSA, MAAA, CERA
- Xuan Deng FSA, MAAA
- Maya Perelman FSA, ACIA, CERA
- Kyle Baxter Stolarz FSA, MAAA
- Xiao Yu Zhang FSA, CERA, MAAA

Session 6C: Smaller Insurance Company Chief Actuary/Appointed Actuary Forum

- Scott D Haglund FSA, MAAA
- Stefanie J Porta ASA, MAAA
- William M Sayre FSA, MAAA

Session 6D: Tax Implications for Annuity Reinsurance

- Hiu Wai Chan FSA
- Don Cho FSA, CERA, MAAA
- Erik Pronovost FSA, CERA

Session 6E: Financial Planning and Analysis - What's Happening Post-LDTI?

- Harry Li FSA, CERA, FCIA
- Jack Pizzo FSA

Session 6F: From Concept to Implementation: Getting Buy-In on Predictive models

- Eric J Carlson FSA, MAAA
- Robert T Eaton FSA, MAAA
- Yang Jing FSA, MAAA
- Houston Perrett FSA, CERA

Session 6G: Efficient Model Management using DevOps Tools

- Tian Peng ASA
- Valerie Smeshko FSA
- Aditya Dushyant Trivedi ASA

Session 6H: Mutual Attractions Driving Disruptions – Private Equity & Insurance Companies

- George Alvites
- Mengran Li FSA, MAAA, CERA
- Matthew McPhail FSA
- Corwin K Zass ASA, MAAA, FCA

Session 7A: Pricing Trends in Life and Annuity Products

- Kendrick D Lombardo FSA, MAAA
- Amber Ruiz FSA, MAAA

Session 7B: New Looks at Life Insurance US Tax Compliance - IRC Section 7702/7702A

- Philip Ferrari ASA, MAAA
- Kimberly W Lunn
- Yaohua Zhou FSA, CERA, MAAA

Session 7C: VM-22 and LDTI: How Does the Emerging PBR Framework for Non-VAs Compare to MRBs Under LDTI?

- Sean Paul Abate FSA, MAAA
- Benjamin J Hanley FSA, MAAA
- Nathan S Lux FSA, MAAA

Session 7D: UL Policyholder Behavior Case Study

- Andrew Davis ASA, MAAA
- John A Gramelspacher FSA, MAAA
- James Nathan Kimbrell FSA, MAAA, CERA
- Laura M Morgan FSA, MAAA

Session 7E: Bermuda Consultation Paper I and II

- Shing Lai Bryan Liu FSA, FCIA
- Jesse Paul Resnick FSA, FCIA
- Michal Ryduchowski FSA, MAAA
- William M Sayre FSA, MAAA

Session 7F: How to Use Generative AI to Accelerate Actuarial Model Development

- Stephen Carlin

Session 7G: The Future of Work for Actuaries

- Corey A Carriker FSA, MAAA
- Vance Lee Forrest FSA, MAAA
- Darryl G Wagner FSA, MAAA

Session 7H: Milliman Session Series, Session 1 - Life Insurer Asset Mix Trends and Implications for the Industry

- Dariush A Akhtari FSA, MAAA, FCIA
- Jack Bishop
- Anthony Dardis FSA, FIA, MAAA, CERA
- Joshua David Dobiac
- Clara Yan, FIA, CFA

Session 8A: Setting Assumptions for PRT: A Pension Actuary's Perspective

- Justin Derek Bevan FSA, CERA, MAAA
- Robert Daniel Gentry FSA, MAAA, CERA
- Caitlynn Greenfield ASA, MAAA
- Stanley T Roberts FSA, MAAA

Session 8B: Lapses in a Rising Interest Rate Environment -- From Assumptions to Actions

- Michal Ryduchowski FSA, MAAA
- Yves Vontobel
- Ying Zhao FSA, MAAA

Session 8C: You Gotta Fight for Your Right to Underwrite

- Mary J Bahna-Nolan FSA, MAAA, CERA
- Susan K Bartholf FSA, MAAA
- Michael Anthony Cusumano FSA, MAAA
- Jan Graeber ASA, MAAA

Session 8D: Assumption Governance and Processes: Current Industry Trends and Best Practices

- Rahat Jain
- Jody Koenemann FSA, MAAA
- Christopher Hatcher Murphy ASA
- Rebecca B Scotchie FSA, MAAA

Session 8E: Reinsurance for Today's Challenges

- Thomas Colbrook FSA, MAAA
- Seth Joel Detert FSA, MAAA
- Laurene Lucile Iannucci ASA

Session 8F: New World: LDTI's Impact on Earnings Emergence and Investor Story

- Naxine Chang FSA, MAAA
- Colin Michael Duke FSA, MAAA
- Ryan Donald Laine FSA, MAAA, CERA
- Gene Paul Del Castillo San Valentin FSA, CERA, MAAA

Session 8G: Actuaries & IT: Working Together for Better Data

- Cathy Gainer
- Ronald J Harasym FSA, FCIA, MAAA, CERA
- Lisa M Nurse ASA, MAAA

Session 8H: Revolutionize Your Workforce

- Kwesi S Acquah FSA, MAAA
- Nathan Pohle FSA, MAAA, CERA

Session 9A: Integrating Your NGE Framework into Actuarial Operations

- Amanda Hug FSA, MAAA
- Linda M Lankowski FSA, MAAA
- Craig W Reynolds FSA, MAAA

Session 9B: Accelerated Underwriting – Evolution and Potential Future Changes

- Mary J Bahna-Nolan FSA, MAAA, CERA
- Sean J Conrad FSA, MAAA
- Allen M Klein FSA, MAAA
- Zhuojie Li FSA, MAAA

Session 9C: Evolving Requirements for Complex Assets – AG53 & Related Regulatory Initiatives

- Donna R Claire FSA, MAAA, CERA
- Lori L Helge FSA, MAAA
- Alan J Routhenstein FSA, MAAA

Session 9D: Market Risk Benefits for GMxB under LDTI: Pros and Cons of Permitted Approaches

- John A Adduci FSA, MAAA
- Wha-Ning Doo FSA, MAAA
- Richard Laurent Hayes ASA, CERA, MAAA

Session 9E: Using Design Thinking to Address Uncertainty Through Creativity and Innovation

- Jeremy Paul Evans FSA, MAAA
- Bryon Robidoux FSA, MAAA, CERA

Session 9F: Cloud-Based Data Architecture – Introduction & Best Practices

- Vikas J Advani FSA
- Jacob Battenberg ASA
- Mathieu Plasse FSA

Session 9G: Milliman Session Series, Session 2: Modeling of Alternative Assets and Complex Investment Strategies

- Logan R Blake FSA, MAAA
- Valea Coyne
- Corey Michael Grigg FSA, MAAA, CERA

Session 10A: Leveraging AI to Augment Actuaries' Role in Inforce Management

- Mary J Bahna-Nolan FSA, MAAA, CERA
- Dror Katzav
- Trey Reynolds
- Ruirui Zhang FSA, CERA

Session 10B: 3rd Parties Regulation and Consent - Effect on Companies and Marketing

- Steven Brogan
- Hezhong Ma FSA, MAAA
- Thomas E Rhodes FSA, MAAA, FCA

Session 10C: Excess Mortality - A Peek Under the Iceberg

- Valerie Michelle Chezem ASA, MAAA
- Steven F Cyboran ASA, MAAA, FCA
- Josh Stirling

Session 10D: Best Practices and Lessons Learned from LDTI Implementations

- Adam Cloe FSA, MAAA, CERA
- Jason Matthew Hiquet FSA, CERA
- Jason Charles Margolies FSA, CERA, MAAA
- Jeremy D Williams FSA, MAAA, CERA

Session 10E: Actuaries, Prevalence-Induced Concept Change, and Other Biases

- Ariel Weis FSA, MAAA, FCIA

Session 10F: Generative Artificial Intelligence (AI) and the Future of the Insurance Industry

- Zachary Boyle
- Kaushik Samanta

Session 10G: Is Life Insurance 'Trending' With Millennials?

- Jeffrey Robert Huddleston ASA, MAAA, CERA
- Bill Jarmuz

Lunch – Professionalism

- R. Dale Hall FSA, MAAA, CERA
- David Schraub FSA, MAAA, CERA

Life Meeting Virtual Event – September 12-14

VIRTUAL - Session 1A: Annuity Market Update

- Nicholas E. Carbo, FSA, MAAA
- David Joseph Elliott, FSA, CERA, MAAA

VIRTUAL - Session 1B: Critical Illness -- A peek into the future

- Mathew David Eberhardt FSA, MAAA
- Stacey Sanders Hunter FSA, MAAA
- Christopher Steinker FSA, MAAA
- Steve Woods

VIRTUAL - Session 1C: National Association of Insurance Commissioners (NAIC) Current Events - An Update from the American Academy of Actuaries

- Donna R Claire FSA, MAAA, CERA
- Linda M Lankowski FSA, MAAA
- Craig D Morrow FSA, MAAA, CERA

VIRTUAL - Session 1D: Presentation Skills

- Raymond E DiDonna FSA
- Bruce A Friedland FSA, MAAA

VIRTUAL - Session 2A: Accelerated Underwriting: Balancing Throughput, Mortality, and Regulatory Risk

- Tom Fletcher
- Kuan Yang FSA, CERA

VIRTUAL - Session 2B: The Evolution of Life & Annuity Actuarial Processes

- Scot Allan Glasford FSA, MAAA
- Christopher David Olechowski FSA, MAAA

VIRTUAL - Session 2C: Reinsurance as a Risk Management Measure

- Jing Zhang Fritz FSA, MAAA, CERA
- Simon Poon FSA, FIA
- Gerald Nicholas Sontheimer III FSA

VIRTUAL - Session 2D: Environmental, Social, and Governance (ESG) Perspectives for the L&A Industry

- Jeffrey Robert Huddleston ASA, MAAA, CERA
- Brandon Righi
- David Sherwood

VIRTUAL - Session 3A: You Gotta Fight for your Right to Underwrite

- Donna Christine Megregian FSA, MAAA
- Kirsten M Pedersen FSA, MAAA

VIRTUAL - Session 3B: Navigating the Future of Insurance: Insights into Day 2 Impacts of IFRS 17

- Nicole Buggy
- Sahreen Moti ASA
- Wansi Xu FSA, FCIA, MAAA

VIRTUAL - Session 3C: Experience Studies: A Modern Approach For Today's Actuary

- Justin A Fountain ASA, MAAA

VIRTUAL - Session 3D: Managing Risk in the General Account: Derivative Trends and Applications

- Nicholas Bloom ASA
- Steven Castleton
- Scott Robidoux
- Rich Vaccaro

VIRTUAL - Session 4A: Setting Assumptions for PRT: A Pension Actuary's Perspective

- Justin Derek Bevan FSA, CERA, MAAA
- Robert Daniel Gentry FSA, MAAA, CERA
- Caitlynn Greenfield ASA, MAAA
- Stanley T Roberts FSA, MAAA

VIRTUAL - Session 4B: Life Happens - Life Product Update

- Donna Christine Megregian FSA, MAAA
- William Gus Mehilos FSA, MAAA

VIRTUAL - Session 4C: 2025 LDTI filers -What You Need to Know

- Taylor Longacre
- Douglas S Van Dam FSA, MAAA
- Christopher D Zuiker FSA, MAAA

VIRTUAL - Session 4D: What Are the Future Actuarial Skills and Roles?

- Elizabeth K Dietrich FSA, CERA, MAAA
- Nathan Pohle FSA, MAAA, CERA
- Ying Wang

VIRTUAL - Session 5A: Mortality and Lapse in a Post-COVID World with Industry Trends

- Houston Perrett FSA, CERA
- Kimberly M Steiner FSA, MAAA

VIRTUAL - Session 5B: We Survived Regulatory Change, Now What?

- Sara J Carstensen FSA, MAAA
- Ryan Michael Kiefer ASA, MAAA
- John Oliver Norton FSA, MAAA

VIRTUAL - Session 5C: Bermuda Outlook and Current Trends

- Hillary Chen ASA, MAAA
- Thomas Girulis
- Antony Moyalan ASA

VIRTUAL - Session 5D: Leveraging AI to Augment Actuaries' Role in Inforce Management

- Mary J Bahna-Nolan FSA, MAAA, CERA
- Tatiana Berezin FSA, MAAA
- Dror Katzav
- Trey Reynolds

VIRTUAL - Session 6A: Rising Interest Rate Environment: Is it Here for Long and What We Can Do About it?

- Seng Siang Goh FSA, MAAA
- Rey Malile FSA, MAAA
- Alexander Tall FSA, MAAA
- Gabriel Wittenberg FSA, MAAA

VIRTUAL - Session 6B: Beyond Disclosure: How to Gain Understanding When LDTI Experience is Not as Expected

- Gregory Scott Johnson FSA, MAAA
- Christopher D Zuiker FSA, MAAA

VIRTUAL - Session 6C: InsurTech and Life Insurance: What's New?

- Manisha Dias FSA, CERA, FCIA
- Kevin J Pledge FSA, FIA
- Lori Weyuker ASA

VIRTUAL - Session 6D: Keep 'em Honest: Model for Misrepresentation

- Vicky Gardner
- Katherine Veronica McLaughlin FSA, MAAA

VIRTUAL - Session 7A: Would You Rather? The Behavioral Science Approach to Product Design

- Aisling Bradfield
- Charles Denis
- Nicholas Allen Stremlau FSA, MAAA

VIRTUAL - Session 7B: AG 53 - A Look Back and What Lies Ahead

- Frederick James Andersen FSA, MAAA
- Pat Cieslinski
- Yuxin Guo FSA, MAAA, CERA
- Dana N Hunt FSA, MAAA
- Lee William Richert FSA, MAAA

VIRTUAL - Session 7C: In the Year of ChatGPTs, Does the Insurance Industry Have a Play?

- Allen M Klein FSA, MAAA
- Nanditha Nandy
- Paulo Pinho
- Weiling Guo FSA, MAAA

VIRTUAL - Session 7D: Structured Actuarial Model Validation

- Mengran Li FSA, MAAA, CERA
- Songchen Zhang FSA, MAAA

VIRTUAL - Session 8A: 3rd Parties Regulation and Consent - Effect on Companies and Marketing

- Kristin Abbott
- Tom Fletcher
- Thomas E Rhodes FSA, MAAA, FCA

VIRTUAL - Session 8B: Extracting Value From Data Visualization Tools: Asset Liability Management Use Case

- Josh Lauer FSA
- Sophie Wang FSA, MAAA, CERA
- Chenyang Zhao FSA, CERA, ACIA

VIRTUAL - Session 8D: Difficult Conversations

- Rebecca B Scotchie FSA, MAAA
- Ariel Weis FSA, MAAA, FCIA

VIRTUAL - Session 9A: Lessons From the 2023 Living to 100 Symposium

- Jean-Marc Fix FSA, MAAA
- Allen M Klein FSA, MAAA
- David Schraub FSA, MAAA, CERA
- Ronora E Stryker ASA, MAAA

VIRTUAL - Session 9B: The Art of Optimizing Actuarial Models

- Matthew Allen Covalle FSA, MAAA, CERA
- Ronald J Harasym FSA, FCIA, MAAA, CERA
- Fred Mendoza

VIRTUAL - Session 9C: SWOT analysis of life insurance/LTC Combo Products

- Robert T Eaton FSA, MAAA
- Jeffrey D Koll FSA, MAAA
- Michael William Mazur
- William Gus Mehilos FSA, MAAA

VIRTUAL - Session 9D: U.S. Insurance Climate Risk Disclosures is Not Near.... it's Here!

- Michal Ryduchowski FSA, MAAA
- Monojit Samanta FSA, FCIA
- John Patrick Wiese ASA