



2019 Statement of Candidacy for Leadership Council

Relevant experience

I started at Actuarial Consulting Group, Inc. (ACG) in Richmond, VA in 1994 and have been there ever since. My current position is Chief Actuary. ACG is a third party administration and actuarial consulting firm specializing in small and mid-size retirement plan of all types, especially including 401(k), cross-tested profit sharing, traditional defined benefit, and cash balance. My professional designations are Fellow of the Society of Actuaries (FSA), Enrolled Actuary (EA), and Member of the American Society of Pension Professionals and Actuaries (MSPA). I am a frequent reader and sometimes contributor to the ACOPA Google group. I am a regular speaker on retirement plan topics locally and around the state to CPAs, medical and dental professionals, and other business owners. I also spoke at the Enrolled Actuaries Meeting for several years earlier this decade. Most of my volunteer experience has been through my church and with my daughter's activities. I have served in roles such as youth soccer coach, Girl Scout leader, and Parent-Teacher Organization President. Professionally, I have benefitted immensely from the hard work and knowledge that others have shared, so I am looking forward to giving back in any way I can.

ACOPA/ASPPA volunteer work

- Speaker at 2018 ASPPA Annual Conference
- Scheduled to speak at two sessions at the 2019 ASPPA Annual Conference
- Scheduled to present a webcast in November 2019
- Authored article for January 2019 ACOPA Monthly, "Constructing RP-2014 Mortality Tables with Projection Scales Is Nothing to Joke About"

Aspirations for ACOPA

This is a tough question to answer since I am a relatively new volunteer with ACOPA and ASPPA. I have benefitted greatly from the Google group and the monthly newsletter and am aware of the fine work being done in holding conferences, providing input to government agencies through comment letters, and advocacy on behalf of Enrolled Actuaries like me. I would be pleased to have a front-row seat to all of these efforts and an opportunity to continue moving the organization forward.