

INTERNATIONAL

(Vote for up to three candidates)

Joy Zhang

Si Xie

Erica Chan

Jiajing Zhang

James Xu

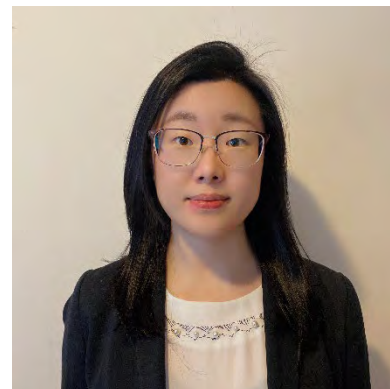
Roberto Gomez

Kai Chi Wu

Joy Zhang, FSA, MAAA, CERA **Senior Manager** **Ernst & Young LLP** **New York, NY**

Professional Background

Joy is a Senior Manager at Ernst & Young's Insurance and Actuarial Advisory Services practice. She has over 11 years of experience providing advisory services in the life and annuity industry, with a focus on financial reporting and FP&A. Joy has extensive experience with IFRS, Embedded Value, US GAAP and Statutory reporting for annuity products. In recent years, Joy has been focusing on IFRS 17 implementation with various global insurers/reinsurers, working with business partners across EMEA, North America, Bermuda and Asia.



Joy co-authored/co-presented the following:

- The New Norm: Equity under IFRS 17 (2023 Life Meeting presentation, August 2023)
- IFRS 17 Earnings Emergence: Through the Risk Adjustment Looking Glass (The Financial Reporter, February 2023)
- Various other SOA newsletter articles and research papers

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

- Friend, SOA International Section (May 2024 – present)
- Chair, SOA Financial Reporting Section (October 2023 – present)
- Vice-chair, SOA Financial Reporting Section (October 2022 – October 2023)
- Council member, SOA Financial Reporting Section (October 2021 – October 2022)
- Member, Actuarial Innovation and Technology Steering Committee (2019 – 2023)

Other Relevant Volunteer Experience

- Secretary, Actuarial Society of Greater New York (ASNY) Board (2023 – present)

Why are you interested in leading this section?

I have had an amazing experience volunteering for the SOA Section – developed technical and leadership skills, expanded network and felt a great sense of accomplishment by giving back to the actuarial society. With my term with the Financial Reporting Section ending, I am hoping to continue my volunteer journey and the International Section has always been one of my top interests.

From my IFRS focus, I have direct experience working on international issues, living through success and challenges and cooperating with business partners across the globe. I am keen to contribute to the community by sharing my insights while learning from other members. In addition, born and raised in China, educated in Canada

with an exchange program to Singapore, I am very passionate about SOA's strategic initiative to expand internationally, particularly in Asia. I am hoping for an opportunity to contribute to that effort.

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Si Xie, FSA, FCIA, CERA
Senior Manager, Product Development
HSBC Insurance
Hong Kong

Professional Background

Si Xie is a senior business leader with proven ability to drive business volume, profit growth and large-scale delivery projects through effective distribution management, innovative business strategies and customer-focused solutions.

After graduating with 1st Class MMath Degree in Mathematics and Statistics from the University of Oxford, Si moved to Canada and pursued a career to become an actuary. Inspired to make a difference in the actuarial profession, Si joined the Corporate Finance and ERM Curriculum committee and exam committee to launch the new curriculum and create new exam styles to help students develop new skills for the changing world.

Intrigued by the past changing insurance industry in Asia, Si joined HSBC Insurance and relocated to Hong Kong in 2017. Her role in a Global Product function allowed her to develop global product strategy and work with local markets such as UK, France, Singapore, China, Hong Kong, and Mexico to build local product strategy. During her time in Hong Kong, Si helped the Actuarial Society of Hong Kong launch its first exam.

In 2019, Si took on the challenge to join a strategically important project to build a brand- new business model to distribute wealth management and insurance products in China. Despite the challenge of aggressive timeline and COVID19, Si helped the team to deliver the MVP launch on time and within budget. Si continued to lead the team to design and provide best-in-class financial advice and product solutions to clients until end of 2023.

Si currently leads the strategy and proposition development for Greater China for HSBC Insurance.



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

- Board of Director (2022 – present)
- Chair of the International Committee (2023 – present)
- Corporate Finance and ERM Curriculum General Officer (2016 - 2018)
- Corporate Finance and ERM Curriculum committee (2012 - 2016)
- Corporate Finance and ERM Exam committee (2012 - 2014).
- CAE university on-site visits (2023 and 2024)

Other Relevant Volunteer Experience

- Actuarial Society of Hong Kong (2018 – 2020)
 - Member of Exam Task Force to launch exam system
- Canadian Institute of Actuaries (2014 – 2016)
 - Member of Communication Committee
- Cookhouse Labs (2020 – 2021)
 - 3-time judge for the 48-hour hackathon events where teams from different continents join together to compete to solve insurance problems
- HSBC business case competition (2019 – 2021)
 - 2-time judge for HSBC Global Business Case Competition

My diverse background in education, innovation and international experience would bring new dimensions and perspectives to the SOA board and help SOA to achieve international success.

Why are you interested in leading this section?

International growth is one of SOA's key strategic pillars. Not only we have significant number of members working outside of US and Canada, International is our fastest growing market. My extensive experience and network in Asia can help the SOA to better serve its members, support the SOA's growth ambition and deepen its influence in the region.

In addition, my diverse background and non-traditional work experience is a good example on how the actuarial profession can thrive in many fields. I want to help our future candidates prepare for the fast-changing landscape, particularly in Asia.

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Erica Chan, FSA, CERA
Principal & Consulting Actuary
Milliman
Hong Kong, SAR

Professional Background

I am a principal and consulting actuary in Milliman's life insurance consulting practice in Hong Kong. I have more than 10 years' experience in the life insurance industry. I have worked on numerous merger and acquisition, capital planning, appointed actuary, EV methodology review and enhancement, actuarial modelling (embedded values, Solvency II/ RBC, IFRS 17, US GAAP) and business planning projects across multiple markets in Asia Pacific region. I am also active in the risk management space including but not limited to ORSA review and setting risk appetite.



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

- Volunteered at Actuarial Innovation & Technology Program Steering Committee.
- Presented in multiple SOA webinars/conferences, the most recent ones are SOA Climate risk management webinar (on-line) and 2024 AICT-SOA joint seminar in Taipei (in person).

Other Relevant Volunteer Experience

I volunteer at

- Strategy & Statutory Path Committee in Actuarial Society of Hong Kong
- SDG Taskforce in international actuarial association

Why are you interested in leading this section?

I am interested in leading the International Section because I believe global collaboration and knowledge exchange in the field of actuarial science will be beneficial to SOA members.

Through my experiences, I have found that there is no one-size-fits-all solution for common issues facing actuaries. In fact, I see diverse perspectives and innovative approaches adopted by professionals in different markets to deal with various issues. I am keen to share what I learned from my work and contribute to the professional development of SOA members

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Jiajing Zhang, FSA, CERA, ACIA
Consulting Actuary
Milliman
Chicago, IL

Professional Background

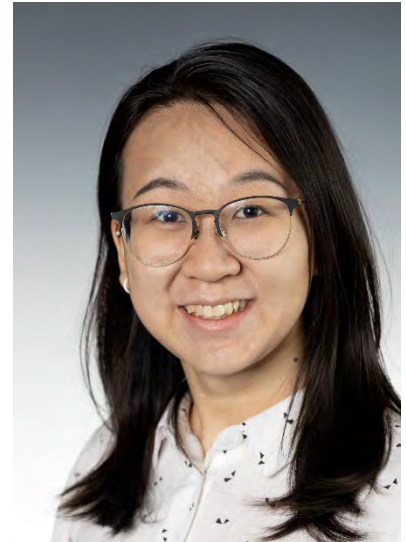
Jiajing (JJ) is a consulting actuary with the Chicago office of Milliman. JJ primarily consults to Life insurance companies on various aspects. Her experiences including actuarial appraisals on both sides, and various US financial reporting. Prior to joining Milliman, JJ worked in Sun Life Financial focusing on IFRS 17 implications, including policy development, modeling, and financial reporting.

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

JJ has volunteered for SOA fellowship exam grading and exam writing. JJ is a member of the following SOA sections: International, Investment, Leadership Development, Reinsurance

Other Relevant Volunteer Experience

- Recruiter and interviewer for actuarial co-op students and new graduate students
- Member of Pacific Rim Actuaries Club of Toronto



Why are you interested in leading this section?

Personally, being an actuary with multiple culture backgrounds (China, Canada, US), the international aspects of actuarial practice have always been my biggest interest. In recent years, I have seen many actuaries working globally, and have had the great opportunity to work with actuaries outside of North America, learning valuable insights about different regulations, issues, and opportunities. I would love to expand on my knowledge and experiences on international issues and developments and would love to contribute as a section council member to help other members who share the same interest.

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James Xu, FSA, MAAA, FCIA, FNZSA
Associate Partner – Actuarial Services
Wavestone Consulting US
Saddle Brook, New Jersey

Professional Background

James Xu is a distinguished actuary with extensive international experience, making him a strong candidate for the International Section Leadership at the Society of Actuaries. His credentials include being a Fellow of the Society of Actuaries (2011), Fellow of the Canadian Institute of Actuaries (2014), and Member of the American Academy of Actuaries (2022).

James is currently an Associate Partner at Wavestone, where he leads the North American Actuarial & Data practice. In this role, he has built and managed a global team, driving significant revenue growth and developing specialized SME teams for IFRS 17 and FP&A offerings. His leadership has been instrumental in winning major projects and expanding the firm's international footprint.

Previously, as the IFRS 17 Actuarial Lead at Farmers Insurance, James spearheaded a team responsible for implementing the IFRS 17 reporting framework, showcasing his ability to manage complex international regulatory projects. At SAS Institute, he served as the Global Product Manager for IFRS 17 and LDTI solutions, overseeing 70+ clients across continents and leading numerous successful global implementation projects.



James's experience at EY as a Senior Manager involved guiding North American clients through IFRS 17 and IFRS 9 assessments, demonstrating his expertise in international financial reporting standards. His role at Foresters Financial saw him launching new products and managing pricing teams, while at RBC Insurance, he directed investment risk management initiatives, further emphasizing his international business acumen.

His earlier career includes significant roles at Manulife Financial, CIGNA New Zealand, AMP/AXA New Zealand, and Swiss Reinsurance Company, where he managed projects and teams across Asia-Pacific, Australia, and New Zealand.

James holds a Leadership Principles certification from Harvard Business School and an MBA and Bachelor of Commerce in Actuarial Studies from Macquarie University. His extensive global experience, leadership skills, and deep understanding of international actuarial practices make him an ideal candidate for the International Section Leadership at the Society of Actuaries.

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

- 2023 Nov – Present: E&I Section Secretary
- 2020 – 2023: Emerging Topic Community
- International Section Council Member
- Item Writer and Exam Grader

Other Relevant Volunteer Experience

- Chair of ERM Sub-Committee for Continuing Education for the Canadian Institute of Actuaries
- Chair of PEC Investment Track for the Canadian Institute of Actuaries
- IFRS 17 Work Group at the American Academy of Actuaries
- Chair of Audit Committee at Chesterbrook Academy

Why are you interested in leading this section?

I am deeply interested in leading the International Section of the Society of Actuaries because I believe in the power of global collaboration and the pivotal role our profession plays in addressing worldwide challenges. My extensive international experience has provided me with a unique perspective on the diverse actuarial practices and regulatory environments across different regions. This has fueled my passion for fostering cross-border knowledge exchange and supporting the professional growth of actuaries globally.

Throughout my career, I have had the privilege of working in various countries, including the United States, Canada, New Zealand, Australia, and Greater China. This exposure has allowed me to understand the nuances of different markets and appreciate the innovative approaches employed by actuaries worldwide. Leading the International Section would enable me to leverage this experience to enhance the value we provide to our members.

I am particularly motivated by the opportunity to:

Promote Global Knowledge Sharing: I aim to facilitate platforms where actuaries from different regions can share insights, best practices, and innovative solutions. This will not only enhance our collective expertise but also help address global actuarial challenges more effectively.

Support Professional Development: By offering targeted educational programs and resources, I want to ensure that actuaries worldwide have access to the latest developments and skills needed to excel in their careers. This includes fostering mentorship and networking opportunities across borders and across Sections within the Society.

Enhance International Collaboration: Building stronger relationships with actuarial bodies and professionals globally will enable us to work together on issues such as regulatory changes, emerging risks, and technological advancements. This collaborative approach will strengthen the global actuarial community.

Champion Diversity and Inclusion: Leading the International Section provides a platform to advocate for diversity and inclusion within our profession. Embracing different perspectives and experiences will drive innovation and better decision-making.

In summary, my passion for global actuarial practices, combined with my leadership experience and commitment to professional excellence, makes me excited about the prospect of leading the International Section. I am dedicated

to advancing our profession on a global scale and ensuring that we continue to provide valuable contributions to the Society.

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Roberto Gomez, ASA
Vice President, Property Treaty Products UW
Swiss Re
Mexico City, Mexico

Professional Background

Roberto is a non-traditional actuary with more than 10 years of experience. He is Vice President at Swiss Re and works as Treaty Product Underwriter for Latin America Market.

He also worked as a traditional actuary in Life and Health business in MetLife in different countries as Mexico, Colombia and US. This experience includes Valuation, Risk Management, Experience Studies and IFRS17 implementation project.

Roberto started his professional career at GNP (the largest Mexican Insurance Company) as a Property Underwriter and then as actuarial associate in Insurance Risk Management for Solvency II implementation.

Roberto graduated from ITAM, Mexico City, with a B.S. in Actuarial Science.

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

Member of Young Professional Advisory Council (2021-2022).

Other Relevant Volunteer Experience

None

Why are you interested in leading this section?

I firmly believe that SOA represents actuarial practice at the top notch. This is an incredible opportunity to help in the development of what SOA's represents around the globe, expanding the knowledge, best practices, professionalism, and reputation that this Association has created. Being based in Latin America can help to develop networking, sharing knowledge and inspire candidates to pursue their actuarial development within SOA and, help Section members to diversify, expand and understand the practices around the region.

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Kai Chi Wu, FSA
General Asia
Hong Kong, SAR

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