SOCIAL INSURANCE & PUBLIC FINANCE

(Vote for up to four candidates)

Bruce Schobel

Greg Fann

Khurram Taufiq

Piotr Krekora

Bruce Schobel, FSA, MAAA

Consulting Actuary
Self-Employed
Winter Garden, FL

Professional Background

Bruce D. Schobel retired from full-time employment in 2012 after 22 years as vice president and actuary of New York Life Insurance Company. Before that, he was a principal of William M. Mercer, Inc., an actuarial consulting firm. During 1979-88, he was with the U.S. Social Security Administration in various actuarial and policy-development positions, including senior policy advisor to the Commissioner of Social Security and staff actuary to the National Commission on Social Security Reform (the "Greenspan Commission"). He was assigned to assist the House Committee on Ways and Means during the drafting of the Social Security Amendments of 1983.

A frequent speaker and writer on tax and Social Security issues, Mr. Schobel's papers and articles have appeared in *The Wall Street Journal*, *Policy Review*, *The Journal of International Taxation* and numerous actuarial publications. He remains active in the Social Security field, writing a regular column on Social Security for the *Journal of Financial Service Professionals* and speaking at various meetings and seminars. A graduate of Massachusetts Institute of Technology, Mr. Schobel is a Fellow of the Society of Actuaries, a Member of the American Academy of Actuaries, a Chartered Life Underwriter, a Certified Employee Benefit Specialist, and a Founding Member of the National Academy of Social Insurance.

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

Mr. Schobel served on the Board of Directors of the Society of Actuaries during 2001-10, including as president during 2007-08. He is currently serving his fourth term on the council of the Society of Actuaries' Social Insurance and Public Finance Section.

Other Relevant Volunteer Experience

Mr. Schobel has also served on the Boards of Directors of the American Academy of Actuaries and the Conference of Consulting Actuaries. For more than a decade, he chaired the Social Security Committee of the American Council of Life Insurers. He is currently serving his second 4-year term as a Trustee of the Winter Garden (FL) Police and Firefighters Pension Board, appointed by the city commission. He is vice president of his local homeowners' association, elected by the homeowners, and was elected president of his previous homeowners' association during 2011-19.

Why are you interested in leading this section?

My lengthy, deep background in social insurance and public pensions allows me to make significant contributions to the SIPF section's activities, as I have been doing since leaving the SOA Board in 2010. I have written more than 20 articles for the section's newsletter, edited the newsletter, been the principal speaker on several webcasts and podcasts, spoken at and moderated a number of section-sponsored sessions at the SOA annual meetings, and served three full 3-year terms on the section council, including a year as chair. I plan to continue contributing to the section's work; as a council member, I would have a greater voice in the section's direction and priorities.

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Greg Fann, FSA, FCA, MAAA
Consulting Actuary
Axene Health Partners
Temecula, CA

Professional Background

Greg Fann is a Consulting Actuary with Axene Health Partners. With 30 years of actuarial experience in the health care space and 18 years as a client-facing consultant, Greg is recognized for his market insights and passion for articulating the importance of actuarial principles in policy considerations and other public forums. Greg has broad experience across all health lines of business and focused expertise in Affordable Care Act marketplaces. Much of his current work is acting as a strategic advisor and providing unique value through a focused understanding of insurance markets and policy implications. His clients include insurance companies, medical providers, benefits consultants, state agencies, attorneys, and public policy organizations. Greg is also actively involved in actuarial research and completed a SOA project examining "Uninsured Rate" Measurements and Health Policy Considerations.

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

- Leader of Health Section Individual/Small Group Markets subgroup (2019-current)
- Health Section Council Member (2022-2025)
- Actuarial Innovation & Technology Steering Committee (2021-2024)
- Chair of Social Insurance & Public Finance Section Council (2020-2021)
- Social Insurance & Public Finance Section Council Member (2018-2021)
- Health Section Council Member (2015-2018)
- Chair of Health Section Strategic Initiatives Committee (2016-2018)
- Education Curriculum Committee (2019-2022)
- Examination Committees (1998-2022), in various executive leadership roles
- Author of examination study notes and two chapters in Group Insurance textbook
- Active member on multiple SOA Health Section subgroups and in other Sections
- Author of articles in The Actuary, Health Watch, and other Section newsletters
- Frequent Speaker at SOA Health Meetings and Annual ImpACT Conferences

Other Relevant Volunteer Experience

- American Academy of Actuaries Premium Review Workgroup
- American Academy of Actuaries Risk Sharing Subcommittee
- Actuarial Standards of Practice No. 50 "Determining Minimum Value and Actuarial Value under the Affordable Care Act" Task Force
- Peer Review of journal articles for Health Affairs
- Speaker at Conference of Consulting Actuaries Spring Meeting
- Presentations to National Association of Insurance Commissioners
    - Health Actuarial Task Force
    - State Rate Review subgroup
- Recent Presentations to:
    - Actuarial Conference of the Southeast
    - Actuarial Conference of the Southwest
    - Middle Atlantic Actuarial Club
    - Philadelphia Actuarial Club
    - Health Insurance Company Team Meetings
- Community Ambassador for local Chamber of Commerce

Why are you interested in leading this section?

I am primarily interested in leading this section to promote actuarial thought in the design of public finance in social insurance and related government programs, e.g. Affordable Care Act individual marketplaces. I previously served as Chair of the Social Insurance & Public Finance Section and have continued to be a Council "friend" offering a health perspective.

As a Council member, I would want to continue fostering the section's excellent work of developing innovative approaches to promote the professional development of section members. I would also like to promote the contribution of actuaries to a broader landscape of public and private entities; my passion is expanding opportunities for actuaries, promoting the profession, and advancing the SOA's objective of informing the public understanding of societal issues.

Through my professional and volunteer efforts, I maintain a strong pulse on current events and have a growing network of industry and policy leaders. It has been rewarding to connect actuaries with other professionals and work collaboratively across business and cultural barriers to agree on systemic problems and seek common ground solutions. These cooperative partnerships have brought the profession excellent exposure and placed actuaries at the forefront of solving complex problems in expanding environments. I aspire to bring insightful perspectives to the Council and its membership, identifying opportunities through focused engagement with other Council members and tactically aligning Council goals with broader SOA initiatives reflective of building actuarial communities as highlighted in the SOA Long-Term Growth Strategy.

In keeping with the SOA's missional tradition, I aim to contribute toward keeping actuaries at the forefront of evolving methods through the provision of trusted insight. I intend to use my intellectual curiosity to explore new arenas where actuarial expertise is needed, identify emerging issues, and partner with Council leaders to explore ideal ways to advance our profession.

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Khurram Taufiq, FSA, MAAA

Health Actuarial Manager
Deloitte Consulting
Dallas, TX

Professional Background

Khurram is a Health Actuary and Manager at Deloitte Consulting. With 10+ years of experience in the health actuarial space, he is passionate about using his skillset and background to make a positive impact across the health care spectrum, especially as it pertains to serving the underserved populations. During his tenure at Deloitte, he has worked with payors, providers, pharmacy benefit managers, and state agencies across a variety of areas including Health Equity, Population Health, Digital Transformation, and Financial Modeling. Prior to joining Deloitte, he served as the Lead Actuary and Director at Parkland Community Health Plan, and a Managing Actuary at Health Care Service Corporation.

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

Author of the Social Insurance & Public Finance "Call for Essays" winning submission (January 2022): https://www.soa.org/sections/social-ins-pub-fin/social-ins-pub-fin-newsletter/2022/ipi-2022-01-taufiq/

Member of the following sections: Social Insurance & Public Finance, Actuary of the Future, Entrepreneurial & Innovation, Financial Reporting, Health, Leadership & Development

Other Relevant Volunteer Experience

Finance Coordinator of the Sabrina Memorial Foundation, which strives to make education accessible and affordable to all, focusing on low-income families in rural areas of the world.

Private Math and Finance Tutor, supporting high school and college students achieve academic excellence through 1:1 coaching and learning sessions.

Why are you interested in leading this section?

I am passionate about elevating the Actuarial profession to take a more proactive and expanded role in supporting the most underserved populations. This section is focused on social programs that are intended to improve the quality of life for all in an equitable manner. I would be honored to help with this cause, and taking on a leadership role in this section would allow me to take a step in that direction. I believe my background and experience will be a valuable addition to the leadership team, and I would also be privileged to learn from the knowledge and background of the rest of the section members.

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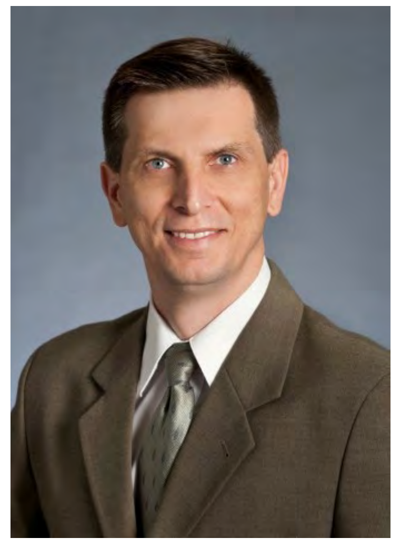
Piotr Krekora, ASA, MAAA, FCA, EA

Consultant
Gabriel, Roeder, Smith & Company
Fort Lauderdale, FL



Professional Background

- Consulting retirement actuary since 2005;
- Primarily public sector practice;
- Focusing on retiree benefits: pensions and other post-employment benefits.

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

- Member of Pension, Health and Social Insurance & Public Finance Sections;
- Past council member for the Social Insurance & Public Finance Section, served in many roles during the tenure;
- Member of the Retirement Plans Experience Committee.

Other Relevant Volunteer Experience

- Member of the Academy's Health Practice Council (currently chairing the Retiree Benefits Committee), chaired a work group submitting Academy's comments to GASB Statement No. 74;
- Currently involved in the drafting of revisions to ASOP 6.

Why are you interested in leading this section?

SI&PF section is unique as its members work in many different areas of practice. We are united by our interest in issues challenging our profession and the society in general with respect to the future our social insurance programs and retirement benefits for public sector employees. These challenges have been subject of my work as an actuary. I am looking forward to facilitating exchange of thoughts from various backgrounds and to stimulating research focused on providing security after retirement without undue burden on the rest of the society.

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