2026 CCA Annual Meeting

Sessions:

001 - Artificial Intelligence and the Future of Risk
October 25, 2026 5:15 PM - 6:55 PM

Artificial intelligence is already changing how we assess risk, use data, make decisions, and serve clients. In our Sunday general session, panelists share what they are seeing in practice: where AI delivers real value, where it falls short, and where human judgment remains essential. The discussion explores what these changes mean for the people and organizations doing this work, including the skills that matter most, the responsibilities that come with AI-driven decisions, and how professional standards and governance may need to evolve. The session closes with a look ahead at how the industry, including actuaries, can help shape the responsible use of AI.

Session Category

Cross Discipline

Credits

EA Non-Core: 2.00

CPD: 2.00

Speakers

- 1 . David Scharf Gallagher
- 2 . Andrew Goebel RGA
- 3 . Scott Brown Optum

002 - Business Session & The Confidence Cycle: The Secret to Everyday Engagement and Motivation
October 26, 2026 8:00 AM - 10:15 AM

The CCA's Monday general session begins with the welcoming of attendees, announcement of new directors and officers, Treasurer's Report and presentation of the CCA's annual awards. Our keynote by Juan Bendana immediately follows. In a world where self-doubt and change are relentless, Juan Bendana helps teams turn uncertainty into an opportunity for personal and professional growth. Based on his ground-breaking book Confident By Choice, his high-energy presentation provides audiences with the tools to build unshakable confidence, overcome imposter syndrome, and cultivate a growth

mindset in the moments where it matters most. Through powerful stories, humor, and actionable takeaways, Juan inspires you to break through mental barriers, reignite motivation for your work (and life!), and step into bold, aligned action.

Session Category

Cross Discipline

Credits

CPD: 1.50

Speakers

- 1 . Robert J. Reiskytl
- 2 . Yi-Ling Lin The Terry Group
- 3 . Robert O. Bacher RBC Human Capital Group
- 4 . Jeremy P. Olszewski Fidelity Investments
- 5 . Juan Bendana

101 - Late Breaking Developments
October 26, 2026 10:45 AM - 12:00 PM

This session delivers a timely overview of the most important late-breaking development affecting pension actuaries and retirement plan consultants. Speakers will look at regulatory updates, market trends, and emerging issues with direct implications for client advice.

Session Category

Retirement

Credits

EA Core: 0.75

EA Non-Core: 0.75

CPD: 1.50

Speakers

- 1 . Michael S. Clark Gallagher
- 2 . Grace Katherine Lattyak Aon

- 3 . Robert Newman Covington & Burling LLP
- 4 . Margaret S. Berger Marsh People and Investments
- 5 . Scott Phillip Steadman U.S. Department of the Treasury - Office of Tax Policy
- 6 . Ted Law Reinsurance Group of America

(Session Assistant)

102 - Small Plans: SECURE 2.0 Plan Administration and Plan Amendments
October 26, 2026 10:45 AM - 12:00 PM

The implementation of SECURE 2.0 continues to present important administrative and compliance challenges for sponsors of small retirement plans and their advisors. Panelists provide a practical update on the latest plan administration requirements, including operational changes, required and optional provisions, and key implementation deadlines. Speakers also address plan amendment requirements, common compliance pitfalls, and strategies for coordinating with plan sponsors, third-party administrators, and legal counsel to ensure plans remain compliant while taking advantage of the flexibility offered by SECURE 2.0.

Session Category

Retirement

Credits

EA Core: 0.75

EA Non-Core: 0.75

CPD: 1.50

Speakers

- 1 . Lance Paul Roteman National Professional Planning Group
- 2 . Kevin Joseph Donovan Pinnacle Plan Design, LLC
- 3 . James E. Holland Cheiron, Inc.

103 - Unique Consulting Issues in Church Plans
October 26, 2026 10:45 AM - 12:00 PM

The church pension world is sometimes referred to as the wild west of the pension world. And without ERISA requirements there is a lot of flexibility, but not everything goes. There is

a whole world of information to be aware of. Come learn some of the basics (and not as basic) of the church plan landscape that any actuary needs to know when consulting with religious organizations.

Session Category

Retirement

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . John Malcolm Merrill Nicolay Consulting Group
- 2 . Nick Haralambos Meggos Aon
- 3 . Lawrence E. Scherer Nyhart

104 - Beyond Traditional Healthcare Plans: Evaluating Alternatives
October 26, 2026 10:45 AM - 12:00 PM

As costs rise, employers are taking a closer look at whether the status quo still works for their active employees in the commercial healthcare market. Speakers explore the evolution of employer-sponsored benefits, key challenges facing the group model, and emerging alternatives. Drawing on perspectives from industry experts, the discussion addresses a range of emerging alternatives and highlights the opportunities, risks, and real-world considerations for organizations considering a transition.

Session Category

Health and Welfare

Credits

CPD: 1.50

Speakers

- 1 . Mark F. Olson Lockton Dunning
- 2 . John Graves Vanderbilt University Medical Center
- 3 . Lindsay Lange WTW

105 - The US Healthcare System: How We got Here and Where is it Going?
October 26, 2026 10:45 AM - 12:00 PM

In a rapidly evolving healthcare landscape, understanding how we arrived here is essential to navigating what comes next. Panelists provide a streamlined look at how the US healthcare system evolved into today's high-cost environment and where it is heading, highlighting key historical drivers – such as market consolidation, rising specialty drug costs, and regulatory shifts – and outline emerging trends that will shape future cost pressures and system reforms.

Session Category

Health and Welfare

Credits

CPD: 1.50

Speakers

- 1 . Justin N. Hornburg Justin Hornburg Consulting
- 2 . Richard Jackson Global Aging Institute
- 3 . Barry Carleton WTW

106 - Governance Best Practices Across Benefit Plans
October 26, 2026 10:45 AM - 12:00 PM

Fiduciary oversight standards long associated with ERISA-covered retirement plans are increasingly being applied to health and welfare plans, both through regulatory enforcement and litigation. This session explores how fiduciary expectations are converging across benefit types, compares governance structures for ERISA and non-ERISA plans, and highlights practical lessons that fiduciaries can draw from each regime. Participants will gain insight into how established retirement plan practices can inform stronger, more defensible fiduciary governance across the full spectrum of employee benefit plans.

Session Category

Cross Discipline

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . Ellen L. Kleinstuber Infinity Actuarial Consulting LLC
- 2 . David Scharf Gallagher
- 3 . Joseph S. Adams Winston Taylor

107 - Computer Stuff for Public Plan Consultants
October 26, 2026 10:45 AM - 12:00 PM

Public pension consultants face increasing digital governance complexity: client AI policies, communications accessibility requirements, cyber hygiene expectations, and related operational technology risks. This session highlights common pitfalls and gray areas offering a practical, consultant-focused discussion on reducing risk and actively managing these consulting dynamics.

Session Category

Public Plans

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . Elizabeth A. Wiley Cheiron, Inc.
- 2 . Matthew A. Strom Segal
- 3 . Kelly Lynn Adams Gallagher
- 4 . Josh Grzesiak

(Session Assistant)

108 - PBGC Update
October 26, 2026 10:45 AM - 12:00 PM

PBGC speakers will discuss current issues the Corporation is tracking – SFA, withdrawal liability regulations, agency funding, etc.

Session Category

Multiemployer Plans

Credits

EA Core: 1.50

CPD: 1.50

Speakers

- 1 . Julie Cameron Segal
- 2 . Kevin M. Muse Pension Benefit Guaranty Corp.
- 3 . Ross Marcelin Pension Benefit Guaranty Corp.
- 4 . Jack Lund Pension Benefit Guaranty Corp.
- 5 . Phillip Jon Loftus Gallagher

(Session Assistant)

109 - Actuaries Mind the Gap: How Pay Transparency Shapes Retirement and Benefit Outcomes

October 26, 2026 10:45 AM - 12:00 PM

The EU pay transparency directive is commonly viewed as a compliance requirement. Yet its most lasting effects will be felt in retirement adequacy and lifetime benefit outcomes. This session examines how greater transparency in pay structures, a job architecture, and career progression directly influences pension accrual, employer contributions, and insured benefit over time. This session connects day-to-day pay decisions with long-term realities, highlighting how small differences compound into significant pension and benefit gaps. Panelists will explore how transparency requirements interact with different pension designs and expose structural inequalities embedded in legacy rewards programs.

Session Category

International

Credits

CPD: 1.50

Speakers

- 1 . Mitsuyasu Nishiwaki WTW
- 2 . James Matthew Davies WTW

- 3 . James D. Burke CBIZ

(Session Assistant)

Inclusive Leadership in Action: Perspectives from Across the Actuarial Profession
October 26, 2026 12:05 PM - 1:30 PM

Inclusive leadership is more than creating a welcoming environment—it requires leaders to understand different experiences, challenge assumptions, and create opportunities for people to contribute fully. But what does that actually look like for actuaries leading teams, organizations, and our profession? Drawing on perspectives from the Sexuality and Gender Alliance of Actuaries (SAGAA), Network of Actuarial Women and Allies (NAWA), International Association of Black Actuaries (IABA), Abacus Actuaries, and Organization of Latino Actuaries (OLA), this panel will explore the real-world challenges and opportunities leaders encounter when building inclusive teams. Expect an honest conversation about what leaders can do, what they may overlook, and how small changes in leadership behavior can make a meaningful difference.

Session Category

Cross Discipline

Speakers

- 1 . Michael S. Clark Gallagher
- 2 . Adrienne Ostroff Lieberthal Athena Actuarial Consulting
- 3 . Riddhi Patel The Walt Disney Company
- 4 . Juan Alfonso Carrillo-Lundgren WTW
- 5 . Nikaya Smith Milliman
- 6 . Craig T. Chu SAGAA: Sexuality and Gender Alliance of Actuaries

Monday Luncheon
October 26, 2026 12:05 PM - 1:30 PM

201 - Working With the PBGC
October 26, 2026 2:00 PM - 3:15 PM

This session explores the practical and professional considerations of working with the Pension Benefit Guaranty Corporation (PBGC) on single employer plans. The discussion will cover standard terminations, PBGC initiated terminations, early warning program,

4062(e) liability, and recent developments. Speakers will discuss their own experiences navigating PBGC-related issues.

Session Category

Retirement

Credits

EA Core: 1.50

CPD: 1.50

Speakers

- 1 . Richard O. Goehring Richard O. Goehring, Inc.
- 2 . Katie B. Kohn Thompson Hine LLP
- 3 . Matthew Fishel Marsh
- 4 . Israel Goldowitz Wagner Law Group

202 - Pension Accounting: Special Topics and Considerations
October 26, 2026 2:00 PM - 3:15 PM

This session moves beyond the fundamentals of ASC715 and IAS19 to address advanced pension accounting topics. The discussion will cover complex and less frequent scenarios. Potential topics include cash balance plans and recent EITF information, plan transactions such as mergers and spinoffs, first-time US GAAP or IFRS adoption, plan termination, and plan accounting under ASC960. This session intends to help attendees manage and address these accounting situations.

Session Category

Retirement

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . Stephen N. Eisenstein KPMG
- 2 . Ben A. Johnson Plante Moran

- 3 . David Thomas Ehr PwC

203 - Social Security and How Can We Fix It?
October 26, 2026 2:00 PM - 3:15 PM

Each of us are expecting to receive a Social Security benefit, but the trust fund/taxes are expected to cover only three quarters of promised benefits fewer than 10 years from now. This session is intended to help each of us understand the current benefit design and evaluate thought-provoking elements that can restore financial soundness, including a discussion of how other countries have addressed their projected shortfalls.

Session Category

Retirement

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . Craig P. Rosenthal Marsh People and Investments
- 2 . James G. Berberian Gallagher
- 3 . Richard Jackson Global Aging Institute
- 4 . Keith T. Sartain U.S. Railroad Retirement Board

(Session Assistant)

204 - Current Topics in Medicare Advantage and Part D
October 26, 2026 2:00 PM - 3:15 PM

Speakers highlight current topics in Medicare Advantage, Part D, and changes to the programs due to the Inflation Reduction Act. Topics will include Medicare Advantage, Part D, employer-sponsored Medicare plans and OPEB valuation issues.

Session Category

Health and Welfare

Credits

CPD: 1.50

Speakers

- 1 . Dan Hoffman Optum
- 2 . Martin W. Hill PricewaterhouseCoopers
- 3 . Richard Paul Shrewsbury Optum
- 4 . Steven D. Draper Ernst & Young, LLP

205 - Double Digit Healthcare Trend
October 26, 2026 2:00 PM - 3:15 PM

Employer healthcare cost increases have accelerated in recent years, approaching or exceeding 10%. Join today's panel as we look at the drivers of this increase, consider what is controllable from an employer's perspective, and debate their relevance and impact going forward. Topics to consider include insurer/provider negotiation, federal legislation and regulation, AI, population health, and workforce dynamics.

Session Category

Health and Welfare

Credits

CPD: 1.50

Speakers

- 1 . Tim Stawicki WTW
- 2 . Matthew Pilkey WTW
- 3 . Nick Albert Garner Health
- 4 . Kathryn I. Curry-Lorusso UnitedHealthcare
- 5 . Andrew Mark Zmich Empower

(Session Assistant)

206 - Investing in Continuous Learning
October 26, 2026 2:00 PM - 3:15 PM

Organizations that prioritize continuous learning don't just keep up, they pull ahead. Companies with strong learning cultures consistently outperform their peers, drive higher profitability, and retain top talent longer. Join a dynamic panel of clients and consultants as

they share their experiences and learnings from their organizations. Expect an interactive session where your questions and perspectives are part of the conversation.

Session Category

Cross Discipline

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . Patricia A. Rotello
- 2 . Riddhi Patel The Walt Disney Company
- 3 . Robert G. Holdom Mars Veterinary Health
- 4 . Lauren Klein Fidelity Investments

207 - DROP it Like it's Hot
October 26, 2026 2:00 PM - 3:15 PM

DROPs have been used as a public plan retention tool almost since inception. However, they have seen a resurgence in interest, and a divergence of provisions, in recent years. Speakers contrast two case studies of recent implementations: one strictly required to be cost neutral and the other with no such considerations. Join the conversation to discuss actuarial and administrative considerations of two DROPs that may barely recognize each other.

Session Category

Public Plans

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . Todd N. Tauzer U.S. Government Accountability Office
- 2 . Brad Edward Ramirez Segal

- 3 . Elizabeth Anne Wiley Hoalt Gallagher
- 4 . Missie A. O'Neal Educational Employees' Supplementary Ret. Sys. of Fairfax Co.
- 5 . Jim Lery San Diego County Employees Retirement Association

208 - Withdrawal Liability Litigation Update
October 26, 2026 2:00 PM - 3:15 PM

Many withdrawal liability issues have been wending their way through the courts with two reaching SCOTUS. Come hear an employer and plan side attorney discuss the current status of cases involving withdrawal liability issues.

Session Category

Multiemployer Plans

Credits

EA Core: 1.50

CPD: 1.50

Speakers

- 1 . Mitchell H. Hofing Dexter Hofing LLC
- 2 . Greg Ossi Norton Rose Fulbright US LLP
- 3 . Jennie Arnold Ledbetter Partners LLC

209 - Alternatives in Asset Allocation
October 26, 2026 2:00 PM - 3:15 PM

Speakers discuss how alternative assets can be used to potentially improve the risk and return characteristics of a portfolio. Topics include hedge funds, portable alpha, and private markets.

Session Category

Investment

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . Joseph C. Anzalone Gallagher
- 2 . David R. Cantor Mercer
- 3 . Kevin Schmid Gallagher

301 - ERISA Trivia
October 26, 2026 3:45 PM - 5:00 PM

Think you can navigate the depths of ERISA better than a trail guide at the Grand Canyon? Scale the Red Rocks of regulations and see if you have what it takes to reach the summit. If you are feeling a bit lost in the desert heat, don't sweat it – you're guaranteed to trek home with some fresh knowledge.

Session Category

Retirement

Credits

EA Core: 1.50

CPD: 1.50

Speakers

- 1 . Yangyan Hu
- 2 . Kurt Thomas Southworth October Three LLC
- 3 . Alexandria Salkauskas Fidelity Investments
- 4 . Tristan Boyles Billing Address

302 - Retiree Medical Strategy: From Plan Design to Actuarial Impact
October 26, 2026 3:45 PM - 5:00 PM

This session provides an overview of retiree medical plan design. The discussion explores how various design features are being utilized, such as Medicare Advantage and EGWPs, the effect of prescription drug rebates, and the use of healthcare reimbursement accounts. There will be a focus on how these plan designs influence the selection of actuarial assumptions and the relationship between plan design and its actuarial impact.

Session Category

Retirement

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . Craig P. Rosenthal Marsh People and Investments
- 2 . Paul L. Koch Aon
- 3 . Kevin James Penderghest Gallagher
- 4 . Steven D. Draper Ernst & Young, LLP
- 5 . Taha Kermalli 630 Merry Brook Circle

(Session Assistant)

303 - Reading the Curve: How Interest Rates Shape DB Investment Decisions
October 26, 2026 3:45 PM - 5:00 PM

Discover how shifts in the shape and direction of the yield curve can influence key investment strategy decisions for defined benefit (DB) plans. Explore the impact on asset allocation, liability matching, and risk management across a range of interest rate environments. Gain insights into how rate changes influence funding strategies, valuation decisions, and long-term plan objectives.

Session Category

Retirement

Credits

EA Core: 0.75

EA Non-Core: 0.75

CPD: 1.50

Speakers

- 1 . Matthew Sampogna Principal Financial Group
- 2 . Michael E. Clark Principal
- 3 . Jessica Kachur Marsh People and Investments
- 4 . Joseph C. Anzalone Gallagher

- 5 . Lynda Dennen Costello BlackRock

(Session Assistant)

304 - Emerging PBMs and Other Pharmacy Topics
October 26, 2026 3:45 PM - 5:00 PM

In recent years, we have seen the introduction of alternative PBM vendors. Speakers will highlight differences with the new PBM models relative to traditional PBMs. Additional topics driving costs in pharmacy benefits will be discussed such as most favored nations pricing, specialty drugs, and GLP-1s.

Session Category

Health and Welfare

Credits

CPD: 1.50

Speakers

- 1 . David M. Tuomala Optum
- 2 . Ian M. Smith Optum
- 3 . Kathleen Freeburg WTW

305 - Value Based Care
October 26, 2026 3:45 PM - 5:00 PM

Value-Based Care ties provider reimbursements to the quality and outcomes of care rather than the volume of services provided. An evidence-based approach that addresses access, quality, service, and costs encourages healthcare hospitals and providers to deliver better care by rewarding them for achieving specific metrics tied to outcomes and improved patient experiences. Our panel of actuaries and clinicians (who have experience in transitioning employer-sponsored health plans from traditional pricing strategies to value-based approaches) provide their insights into the models used in these programs and the factors that drive success for patients and health systems to reduce total costs, improve care, and yet make health sustainable for all.

Session Category

Health and Welfare

Credits

CPD: 1.50

Speakers

- 1 . Edward M. Pudlowski MorningStar Actuarial Consulting, LLC
- 2 . Mark F. Olson Lockton Dunning
- 4 . Richard M Gamret Arbital Health

306 - SCOTUS and Actuaries
October 26, 2026 3:45 PM - 5:00 PM

The US Supreme Court has ruled on many ERISA and ACA cases over the years that had been incredibly impactful in the employee benefits world. This session will describe how such cases wind up at SCOTUS in the first place, and dives into several of the more impactful cases relevant to actuaries and consultants working in the employee benefits space.

Session Category

Cross Discipline

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . Elena V. Black The Terry Group
- 2 . Melissa D. Hill Morgan, Lewis & Bockius LLP
- 3 . Matthew A. Russell Morgan Lewis & Bockius LLP
- 4 . Beth Baker Naxara

(Session Assistant)

307 - Risk Sharing: An Oasis in the Pension Funding Desert
October 26, 2026 3:45 PM - 5:00 PM

As public pension plans face shifting economic climates, many of the states' largest systems have moved beyond traditional designs to embrace sophisticated risk sharing mechanisms. But does shifting the "heat" actually keep the plan cool? Join us for a deep dive into the inner workings of major public plans as we hear directly from in-house

actuaries who have navigated these waters. This session moves past the rhetorical to examine the real-world “lessons learned” from implementing and managing Variable COLAs and cash balance designs.

Session Category

Public Plans

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . Kevin Scott Spanier Gallagher
- 2 . Todd David Kanaster S&P Global
- 3 . Douglas J. Fiddler South Dakota Retirement System
- 4 . David Lamoureux California State Teachers' Ret. Sys.
- 5 . Michelle Boyles Bolton

(Session Assistant)

308 - Risk-Sharing Plan Designs
October 26, 2026 3:45 PM - 5:00 PM

A look at alternative plan designs which share plan risks between participants and plan sponsors.

Session Category

Multiemployer Plans

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . Jeremy C. Roberts
- 2 . Aaron Shapiro Milliman

- 3 . John Michael Redmond Segal
- 4 . Brian C. Donohue October Three LLC

309 - Retirement Systems at the Intersection of Capital Culture and Care
October 26, 2026 3:45 PM - 5:00 PM

Retirement systems reflect cultural attitudes toward risk, family responsibility, and the role of the state as much as they do financial design. This session examines how different societies have developed retirement frameworks – from conservative capital focused systems to models that rely on family structures or public welfare – and what choices mean for participant outcomes. This session offers a balanced perspective on aligning retirement design with both financial efficiency and social reality.

Session Category

International

Credits

CPD: 1.50

Speakers

- 1 . Mitsuyasu Nishiwaki WTW
- 2 . Francesco Briganti Cross Border Benefits Alliance-Europe
- 3 . Kale Edward Sears WTW

401 - Oasis of Clarity: Understanding ASOPs 51 and 56
October 27, 2026 8:00 AM - 9:15 AM

This session will revisit Actuarial Standards of Practice (ASOPs) 51 and 56, exploring why each Standard exists and what purpose they serve in a desert of assumptions, modeling and risk. These ASOPs require additional accompanying disclosures to actuarial results that need to be reviewed regularly. The session will guide you to the oasis.

Session Category

Retirement

Credits

EA Core: 1.50

CPD: 1.50

Speakers

- 1 . Mark Andrew Afdahl WTW
- 2 . James Andrew Nolan Segal
- 3 . Julie M. Ferguson Marsh People and Investments
- 4 . Kenneth K. Lining Gallagher Benefit Services, Inc.

402 - Plan Terminations: Spotting the Rattlesnake Before It's Too Late
October 27, 2026 8:00 AM - 9:15 AM

Terminating a plan is easy, right? What can possibly go wrong? In this session, speakers examine pitfalls related to regulatory requirements, data integrity, missing participants, lump sum elections, and annuity purchases. Attendees gain practical insights into how to spot and address these costly surprises before they strike.

Session Category

Retirement

Credits

EA Core: 1.50

CPD: 1.50

Speakers

- 1 . Kurt Thomas Southworth October Three LLC
- 2 . Rose Zaklad Groom Law Group
- 3 . Jamie Michelle Sloat Mercer
- 4 . Hilja Viidemann Gallagher

(Session Assistant)

403 - Incorporating Retirement Income Certainty Into a DC Plan World
October 27, 2026 8:00 AM - 9:15 AM

As Defined Contribution plans continue to dominate the retirement landscape, the challenge of converting savings into sustainable income has come sharply into focus. This session explores how lifetime income products and solutions can transform 401(k) balances into dependable retirement paychecks. Speakers will examine various market offerings alongside fiduciary considerations and regulatory developments.

Session Category

Retirement

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . Michael S. Clark Gallagher
- 2 . Spencer Look Morningstar Center for Retirement and Policy Studies
- 3 . Dan Froehlich Fidelity Investments

404 - Total Rewards Strategy: Aligning HR Strategy with Financial Reality
October 27, 2026 8:00 AM - 9:15 AM

Stop treating your budget as an enemy and start using it as a strategic advantage. In this interactive panel discussion, leaders from finance, HR, and health actuarial/benefits come together to explore how actuarial insight and cross-functional collaboration—rather than competition—can unlock smarter, evidence-based investments in compensation, health and welfare benefits, development, and wellness programs. Panelists share real-world perspectives on using claims and utilization trends, plan design levers, and total rewards forecasting to align people priorities with financial discipline—helping organizations improve retention, engagement, and performance while managing medical trend, volatility, and long-term cost drivers. Attendees actively participate in the discussion and leave with practical approaches for bridging people goals and profit margins through data-driven benefit strategy, scenario modeling, and ROI measurement.

Session Category

Health and Welfare

Credits

CPD: 1.50

Speakers

- 1 . Jessica Arnold Alight Solutions
- 2 . Thuong Broaden Deloitte Consulting LLP

- 3 . Tanya Rizzuto Colgate-Palmolive
- 4 . Diep Do Stephan Deloitte Consulting LLP
- 5 . Rob Watts Lowe's Companies Inc.
- 6 . Paul Albarano Alliant Insurance Services

(Session Assistant)

405 - AI for Healthcare Actuaries
October 27, 2026 8:00 AM - 9:15 AM

This is a practical session on where AI can add value in health actuarial work today – automating data prep, accelerating analysis and reporting, and supporting forecasting and insights. We'll highlight real-use cases, common pitfalls, and the governance actuaries need to get right (privacy/PHI, bias, and documentation). Attendees will leave with a simple framework for adopting AI responsibly and identifying the near-term opportunities in their workflow.

Session Category

Health and Welfare

Credits

CPD: 1.50

Speakers

- 2 . Ben Li WTW
- 3 . Daniel Callahan Lockton

406 - Know Your Audience
October 27, 2026 8:00 AM - 9:15 AM

Emotional intelligence is crucial for actuaries communicating complex, technical data to non-actuarial stakeholders. Our speakers will address stakeholder management, understanding your audience, and using EI to foster trust and clarity.

Session Category

Cross Discipline

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . Phillip A. Merdinger October Three
- 2 . Tony E. Holmes 9 True Illusions LLC
- 3 . Jami Eckman Marsh People and Investments
- 4 . Sheena McEwen Banner Life family of companies

407 - Navigating the OPEB Desert
October 27, 2026 8:00 AM - 9:15 AM

Learn how to navigate the many changes surrounding OPEB. Topics we'll cover include healthcare trends and the Getzen model, the Inflation Reduction Act, setting OPEB-specific assumptions, changes to ASOP 6, and the Academy's Practice Note on Funding for Public OPEB Plans that's expected to be published later this year. More technical topics related to OPEB plan design will be covered in session 302 “Retiree Medical Strategy: From Plan Design to Actuarial Impact.”

Session Category

Public Plans

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . Michael J. de Leon Deloitte
- 2 . Robert Logan Grime Athena Actuarial Consulting
- 3 . Thomas G. Vicente Bolton Partners, Inc.
- 4 . Kelvin Scott Benton Deloitte

(Session Assistant)

408 - Multiemployer Plan Mergers
October 27, 2026 8:00 AM - 9:15 AM

This session will explore the ins and outs of multiemployer plan mergers, with focuses on common pitfalls, plan, union and employer considerations, withdrawal liability, etc.

Session Category

Multiemployer Plans

Credits

EA Core: 1.50

CPD: 1.50

Speakers

- 1 . John Michael Redmond Segal
- 2 . Julie Cameron Segal
- 3 . Jay K. Egelberg First Actuarial Consulting, Inc.
- 4 . Jack Lund Pension Benefit Guaranty Corp.

409 - Recent Retirement Governance Changes in Canada
October 27, 2026 8:00 AM - 9:15 AM

There have been important governance changes in Canada in the fall of 2024 with regard to pension plan governance. The changes provide revised guidance to employers and require careful attention to how plan administrators carry out their oversight responsibilities. Speakers include a practicing pension consultant who consults with defined contribution clients on this important subject. Expect to hear very practical advice not only for Canadian plans but also general governance ideas that have global applicability.

Session Category

International

Credits

CPD: 1.50

Speakers

- 1 . Douglas J. Carey Retired
- 2 . Sophie Seguin AGA Benefit Solutions

003 - Ethics in the Desert: Finding Direction When Landmarks Fade
October 27, 2026 9:45 AM - 11:25 AM

When familiar landmarks fade, how do you stay oriented? Panelists explore the ethical challenges facing retirement actuaries. Through engaging case studies and interactive discussion, we'll examine situations where the right path isn't always clear. Join us to test your instincts, sharpen your ethical compass, and strengthen the principles that guide your professional decisions.

Session Category

Retirement

Credits

EA Ethics: 2.00

CPD: 2.00

Speakers

- 1 . Jeremy P. Olszewski Fidelity Investments
- 2 . Lauren Klein Fidelity Investments
- 3 . Evan Robert Thomas Bolton Partners Inc
- 4 . Brian Septon Septon Strategies
- 5 . Emojoy Brown BlackRock

004 - Professionalism and Ethics for Healthcare Actuaries
October 27, 2026 9:45 AM - 11:25 AM

Adhering to Actuarial Standards of Practice, applying sound judgement and analytical rigor, prioritizing ethical decision-making and communicating complex results clearly and responsibly for healthcare actuaries is what you can expect to learn in this session through interactive case studies written by the panelists. There will be prizes!

Session Category

Health and Welfare

Credits

CPD: 2.00

Speakers

- 1 . Tanya E. Sun Segal
- 2 . Justin N. Hornburg Justin Hornburg Consulting
- 3 . Edward M. Pudlowski MorningStar Actuarial Consulting, LLC
- 4 . Tim Stawicki WTW
- 5 . Yi-Ling Lin The Terry Group
- 6 . Mary P. Kirby Segal
- 7 . Vaidehi Hoyer HUB International

Tuesday Luncheon
October 27, 2026 11:30 AM - 1:00 PM

Beyond Good Advice: When to Coach, Mentor, Manage, and Sponsor
October 27, 2026 11:30 AM - 1:00 PM

Effectively leading in consulting requires more than technical expertise. It also requires developing and supporting others, using the right approach for each situation. Coaching, mentoring, managing, and sponsoring each serve a different purpose; the key is recognizing which situations require which. This Women in Consulting luncheon forum will distinguish the four approaches and show how to use each intentionally to develop individuals and empower teams. Using real-world scenarios, presenters explore when to coach by helping others develop their own skills and thinking, when to mentor by sharing guidance and relevant experience, when to manage by providing direction and setting expectations, and when to sponsor by creating opportunity and visibility. Participants learn how to choose and apply the best approach for a given situation, and how to determine and acquire the support they need for their own careers. Hosted by the Women in Consulting Community, this lunch is designed for consultants at every career stage, and all attendees, whether women or allies, are welcome.

Session Category

Cross Discipline

Speakers

- 1 . Ellen L. Kleinstuber Infinity Actuarial Consulting LLC
- 2 . Elizabeth A. Wiley Cheiron, Inc.
- 3 . Tonya B. Manning Gallagher

- 4 . Julie Cameron Segal

501 - Desert Horizons: A Plan for Sustainable Lifetime Benefits
October 27, 2026 1:30 PM - 2:45 PM

The Retirement Security Innovation Initiative's (RSII), sponsored by CCA, brought together a broad group of industry experts to develop a retirement plan featuring fixed costs and cost-effective lifetime benefits. Attendees will learn about key stakeholder feedback from employers, actuaries, recordkeepers, and investment firms that has shaped the plan.

Session Category

Retirement

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . Lee D. Gold Marsh People and Investments
- 2 . Ellen L. Kleinstuber Infinity Actuarial Consulting LLC
- 3 . Joshua Shapiro Groom Law Group, Chartered
- 4 . Andy Banducci ERISA Industry Committee

502 - Identifying and Navigating Gaps in Guidance
October 27, 2026 1:30 PM - 2:45 PM

Retirement plans have been the topic of thousands of pages of law, tax code, regulation, and informal guidance. But somehow there are still things we don't know – both new and old topics. Panelists discuss some of the items we wish we knew or had guidance on, as well as approaches to take when you find yourself in one of these situations. Discussion topics include: market-based cash balance plans, multiple annuity starting dates and 415 limits, spinoffs and funding method changes, SECURE Act guidance, and post year-end amendments.

Session Category

Retirement

Credits

EA Core: 1.50

CPD: 1.50

Speakers

- 1 . Matthew Sampogna Principal Financial Group
- 2 . James E. Holland Cheiron, Inc.
- 3 . Bruce Cadenhead Marsh
- 4 . Tristan T. Christ WTW

503 - Annuity Placements Discussion: Trends, Outlooks, and Sponsor Considerations
October 27, 2026 1:30 PM - 2:45 PM

Pension risk transfer has evolved far beyond landmark megadeals into a dynamic market where buy-ins are surging and sponsors are actively rethinking their de-risking strategies. Join a diverse panel of insurer representatives to analyze the surge in buy-ins and what it means for long-term de-risking. Learn how improved funded statuses, changing interest rates, and evolving legal landscapes are influencing the sponsor's journey—from initial data cleanup and insurer selection to final participant integration. The panel also tackles complex plan structures, pricing assumptions, and longevity trends.

Session Category

Retirement

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . Yangyan Hu
- 2 . Alexandre D Gagnon Banner Life family of companies
- 3 . Elizabeth Walsh MetLife
- 4 . Michelle Lynne Rosel RGA
- 5 . Kerri Dantos Prudential

(Session Assistant)

504 - How Hospitals and Healthcare Providers are Using AI and Why Consultants Should Pay Attention

October 27, 2026 1:30 PM - 2:45 PM

AI is already being used across hospitals and provider organizations to improve operations, clinical support, patient flow, documentation, and cost management. Many discussions, however, focus on the technology itself rather than how these tools are being applied in everyday care delivery. This session provides practical examples of how health systems are using AI today and translates those use cases into implementations for cost, utilization, risk, and operations. Attendees will leave with a clearer understanding of what is happening inside health systems and how to apply this knowledge in client conversations and advisory work.

Session Category

Health and Welfare

Credits

CPD: 1.50

Speakers

- 1 . Yi-Ling Lin The Terry Group
- 2 . Munzoor Shaikh Long Game Health Consulting
- 3 . Adam Seidner Long Game Health Consulting
- 4 . Taposh D. Roy Kaiser Permanente
- 5 . Rajiv Doolabh Kaiser Permanente
- 6 . Kevin E. Dotson Judi Health

(Session Assistant)

505 - Should We Do CHOICE (Formerly ICHRA)? Financial Considerations for Employer Decision Makers

October 27, 2026 1:30 PM - 2:45 PM

This session builds upon last year's ICHRA introduction by focusing on the numbers consulting actuaries are asked to produce. After a brief refresher on ICHRA fundamentals, we'll walk through the core financial considerations employers and their advisors need to evaluate – cost trajectory and budget control, risk transfer and volatility, affordability guardrails, administrative compliance costs, and employee impact tradeoffs. Attendees

will leave with a practical framework to help HR and Finance respond to C Suite questions like, “Why aren’t we doing ICHRA?”

Session Category

Health and Welfare

Credits

CPD: 1.50

Speakers

- 1 . Ben Li WTW
- 2 . Cory Jorbin HUB International
- 3 . Andy Mueller
- 4 . Daniel Callahan Lockton

506 - Immigration Projection Practice and How to Improve It
October 27, 2026 1:30 PM - 2:45 PM

As birthrates have fallen, migration has become an increasingly important determinant of U.S. population growth and age structure. As a consequence, it has also become an increasingly important determinant of economic performance, fiscal capacity, and the sustainability of government spending commitments. Yet the migration assumptions that actuaries and demographers use in making population projections remain largely ad hoc. The prevailing belief seems to be that migration flows, because they are subject to the vagaries of unexpected crises and policy shifts, are simply too volatile and unpredictable to model. This session seeks to challenge that belief. While it is true that in the near-term migration flows are indeed volatile and unpredictable, in the long term they are closely correlated with broader demographic, economic, and social trends that can be modeled with reasonable confidence. Speakers at this session discuss the push and pull factors that drive migration internationally, and explain how modeling those same factors can improve long-term domestic population projections.

Session Category

Cross Discipline

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . Thomas S. Terry The Terry Group
- 2 . Richard Jackson Global Aging Institute
- 3 . Liaw Huang The Terry Group

507 - Legislation and Litigation: The Prickly Pair
October 27, 2026 1:30 PM - 2:45 PM

Come join our session to hear the latest updates on the prickly pair of legislation and litigation affecting public plans, from both statewide and federal perspectives.

Session Category

Public Plans

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . Koren L. Holden Colorado PERA
- 2 . Caleb Durling Fox Rothschild LLP
- 3 . Jeannine Markoe Raymond National Assn. of State Retiremt. Admins.
- 4 . Elizabeth Anne Wiley Hoalt Gallagher

(Session Assistant)

508 - SFA Retrospective and Next Steps
October 27, 2026 1:30 PM - 2:45 PM

With the Special Financial Assistance application process winding down, attention now turns to post-SFA compliance and strategies. Speakers review the rules that apply to plans that receive SFA and discuss funding strategies. The panel also discusses current events with the eligibility of terminated plans, and reflect on the program's successes and failures.

Session Category

Multiemployer Plans

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . Amanda Lyn Borden Segal
- 2 . Brian Hartsell The McKeogh Company
- 3 . Lori R. Waichman Mooney Green Saindon, Murphy & Welch, P.C.

509 - Capital Markets - What Can Go Wrong?
October 27, 2026 1:30 PM - 2:45 PM

Speakers provide an update on capital markets, including historically high equity valuations. Panelists identify factors influencing capital markets going forward, and highlight the downside risks.

Session Category

Investment

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . Jerry Mingione The Terry Group
- 2 . Jonathan R. Barry MFS Investment Management
- 3 . Brian C. Donohue October Three LLC
- 4 . R. Evan Inglis The Terry Group

Retirement Security Innovation Initiative Forum
October 27, 2026 3:00 PM - 4:00 PM

Members of the Retirement Security Innovation Initiative provide an update on their activities.

Session Category

Retirement

Healthcare Community Forum
October 27, 2026 3:00 PM - 4:00 PM

The CCA Healthcare Community meets to discuss current issues, outlooks, and news. Neither CCA nor community membership is required to attend.

Session Category

Health and Welfare

Multiemployer Plans Forum
October 27, 2026 3:00 PM - 4:00 PM

The CCA Multiemployer Plans Community meets to discuss current issues, outlooks, and news. Neither CCA nor community membership is required to attend.

Session Category

Multiemployer Plans

Public Plans Community Forum
October 27, 2026 3:00 PM - 4:00 PM

The CCA Public Plans Community meets to discuss current issues, outlooks, and news. Neither CCA nor community membership is required to attend.

Session Category

Public Plans

601 - Your Desert Compass: Navigating Pension Administration
October 28, 2026 8:00 AM - 9:15 AM

Pension administration comes with many hazards, including complex calculations, administration, HRIS systems, and data quality. This session will provide some tools and approaches to deal with these hazards to improve valuation quality data and reduce administrative errors.

Session Category

Retirement

Credits

EA Core: 1.50

CPD: 1.50

Speakers

- 1 . Mark Andrew Afdahl WTW
- 2 . Jamie Michelle Sloat Mercer
- 3 . Jennifer Tabb RGA
- 4 . Mike Irey Pension Benefits Information, LLC dba PBI Research Services
- 5 . Timothy William Devoe WTW

602 - Retirement Litigation
October 28, 2026 8:00 AM - 9:15 AM

The speakers review recent court decisions, ongoing litigation and complaints filed that could affect defined benefit plans or pension actuaries. This year's cases may involve actuarial malpractice, actuarial equivalence, actuarial assumptions, erroneous benefit determinations, recent Supreme Court decisions, and others.

Session Category

Retirement

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . David R. Godofsky Alston & Bird, LLP
- 2 . Robert Newman Covington & Burling LLP
- 3 . Katie B. Kohn Thompson Hine LLP

603 - AI 2.0 for Retirement Actuaries: Turning up the Heat
October 28, 2026 8:00 AM - 9:15 AM

This session will explore practical, real-world use cases where AI can improve efficiency and consistency. Case studies will include enhancing communications, supporting data analysis, and assisting with research efforts.

Session Category

Retirement

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . Brian Young Boring EY
- 2 . Grace Barbieri
- 3 . Jami Eckman Marsh People and Investments
- 4 . Carmen Vincent Gatta Club Vita
- 5 . Jeffrey A. Rees Deloitte Consulting LLP

Sessions:

604 - Pre-Medicare and Medicare Market Update
October 28, 2026 8:00 AM - 9:15 AM

Elevated costs and legislative changes have put pressure on employers offering Pre-Medicare and Medicare Eligible coverage. Join us as we discuss some of the drivers of cost, how the market dynamics are changing, and what employers are doing to manage their retiree medical offerings.

Session Category

Health and Welfare

Credits

CPD: 1.50

Speakers

- 1 . Valerie Brencher Mercer
- 2 . Christopher Robert Maikels Aptia Group
- 3 . Scott Damery Oliver Wyman, Inc.
- 4 . Jennifer Leming Marsh People and Investments
- 5 . Andrew Mark Zmich Empower

(Session Assistant)

605 - The Current State of Ancillary Benefits
October 28, 2026 8:00 AM - 9:15 AM

Ancillary benefits, such as life insurance, disability and leaves of absence, dental, vision, and voluntary benefits are an important part of an employee's healthcare benefits offering. This session will cover the ancillary benefits landscape and focus on recent changes and innovations in this space.

Session Category

Health and Welfare

Credits

CPD: 1.50

Speakers

- 1 . Jennifer Nelson Schaefgen American Benefits Consulting
- 2 . Courtney Morin Northeast Delta Dental
- 3 . Patrick Miller AFLAC

606 - Long Term Care - Where are We Now and Where are We Going?
October 28, 2026 8:00 AM - 9:15 AM

One of the most daunting challenges facing our population is how to plan for and afford long term care. This session will review the current environment/options and possible future solutions.

Session Category

Cross Discipline

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . Phillip A. Merdinger October Three
- 2 . Stephen C. Soulas Northwestern Mutual

- 3 . Vincent Bodnar Lumos Insurance
- 4 . Tom Riekse LTCI Partners

607 - Multiple Employer Plans: Cost Sharing vs Agent Multiple
October 28, 2026 8:00 AM - 9:15 AM

Many statewide governmental plans are comprised of hundreds or in some cases thousands of individual employers. Cost sharing plans typically calculate a single contribution rate for all employers while agent multiple plans will calculate a different contribution rate for each employer based on that employer's experience. Both approaches can create distinct challenges for both individual employers and the system as a whole. This session will compare and contrast the two approaches with regard to spotting assumptions, funding policies, and compliance with Actuarial Standards of Practice.

Session Category

Public Plans

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . Mark Henry Buis Gabriel Roeder Smith & Company
- 2 . Paul Matthew Baugher Foster & Foster, Inc.
- 3 . Paul Matson Arizona State Retirement System
- 4 . Paul Thomas Wood Gabriel Roeder Smith & Company
- 5 . Ryan Ruby Municipal Employees Retirement System of Michigan

(Session Assistant)

608 - Stochastic Modeling for Multiemployer Plans
October 28, 2026 8:00 AM - 9:15 AM

Effective trustee decision-making requires an understanding of the long-term risks and uncertainties associated with pension funding. Stochastic modeling can be a powerful tool, but its value depends on the assumptions and methodologies used – and on the ability to translate results into actionable insights. In this session, panelists discuss

modeling techniques, when stochastic analysis can support trustee decisions, and best practices for communicating results.

Session Category

Multiemployer Plans

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . Joshua Shapiro Groom Law Group, Chartered
- 2 . Joshua Allmen Rael & Letson
- 3 . Alexander Giordano Segal
- 4 . Spencer Look Morningstar Center for Retirement and Policy Studies

609 - Mergers, Acquisitions, and Divestitures
October 28, 2026 8:00 AM - 9:15 AM

Interactive session where participants will work through a number of real-world scenarios.

Session Category

International

Credits

CPD: 1.50

Speakers

- 1 . Mike Spetko Deloitte Consulting LLP

701 - Thriving in Your Oasis: Managing Withdrawals and Taxes as You Plan Your Own Retirement
October 28, 2026 9:30 AM - 10:45 AM

This session will discuss key planning considerations across both the accumulation and documentation phases, including sequence of withdrawals across account types, RMDs, coordination with Social Security and Medicare, tax planning, and the role of inheritance planning and charitable giving in retirement and pre-retirement.

Session Category

Retirement

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . Brian Young Boring EY
- 2 . Ruth E. Schau
- 3 . Philip Kim
- 4 . Liz Ann Kochneff Alight
- 5 . Joe Chavez Lopez The Standard

(Session Assistant)

702 - Small Plan Terminations
October 28, 2026 9:30 AM - 10:45 AM

Terminating a qualified small employer retirement plan involves navigating a complex web of IRS and DOL regulations. For financial and tax professionals, guiding a small business client through this process requires a meticulous understanding of timing, compliance testing, participant notifications, and asset distribution. Panelists provide a comprehensive, step-by-step roadmap for executing a successful small plan termination. Participants will learn how to identify common operational pitfalls, manage the winding-down of plan assets, and ensure all regulatory filing requirements are met to avoid costly penalties and plan disqualification. Participants will come away with ability to identify the legal and operational triggers that necessitate a plan termination, outline the timeline and procedural steps to terminate a small employer plan, including the compliance requirements, protocols for finding missing participants, distributing plan assets, and accurately preparing the final regulatory forms specifically focusing on the final form 5500.

Session Category

Retirement

Credits

EA Core: 1.50

CPD: 1.50

Speakers

- 1 . Lance Paul Roteman National Professional Planning Group
- 2 . Lynn M. Young Pinnacle Plan Design, LLC
- 3 . Kevin Joseph Donovan Pinnacle Plan Design, LLC

703 - But It's a Dry Heat: Hot Topics for Nonqualified Plans
October 28, 2026 9:30 AM - 10:45 AM

Familiarize yourself with the newest issues and trends in nonqualified plans, including market best practices for design, considerations with terminating plans, legislative/regulatory updates and emerging programs gaining traction.

Session Category

Retirement

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . Grace Barbieri
- 2 . David Scharf Gallagher
- 3 . Aaron J.L. Pedowitz Marsh People and Investments
- 4 . Phillip Jon Loftus Gallagher

(Session Assistant)

704 - SOA Research and the Actuarial Profession in an AI-Driven Era
October 28, 2026 9:30 AM - 10:45 AM

The Society of Actuaries (SOA) Research Institute continues to invest heavily in forward looking research that informs actuarial practice across health, retirement, and financial security—while also preparing the profession for rapid technological change. Presenters highlight select, recent SOA research initiatives, offering insight into how research topics are identified, funded, and translated into practical value for actuaries and their stakeholders.

A central focus of the discussion is expected to be the growing role of artificial intelligence in the actuarial profession. Come to learn how the SOA is addressing AI through research, governance frameworks, and partnerships, and what these efforts mean for actuarial work in healthcare and beyond. Panelists also provide perspective on how actuaries can engage with SOA research—both as consumers and contributors—as the profession evolves.

Session Category

Health and Welfare

Credits

CPD: 1.50

Speakers

- 1 . James Dolstad Optum
- 2 . R. Dale Hall Society of Actuaries
- 3 . Ryan Silhavy Society of Actuaries

705 - Healthcare on the Hill
October 28, 2026 9:30 AM - 10:45 AM

Healthcare policies continue to be a hot topic on Capitol Hill. Panelists dive deeper into what policies have already been implemented, what may be in the pipeline for healthcare legislation and regulation, and how midterms could shape what comes next.

Session Category

Health and Welfare

Credits

CPD: 1.50

Speakers

- 1 . John McAndrew Brown & Brown
- 2 . Elena Lynett Segal
- 3 . Brigen L. Winters Groom Law Group
- 4 . Rebecca S. Alcorn Mindset

706 - Professionalism Tools for Consulting Actuaries
October 28, 2026 9:30 AM - 10:45 AM

Consulting actuaries rely on a broad set of tools to support professionalism, sound judgment, risk management, and navigation of complex client and stakeholder relationships. This session provides an overview of key professionalism resources in the actuary's toolkit and highlights selected resources developed (or in development) by the CCA's Professionalism Committee, including papers on documentation requirements, peer review, and actuarial communications.

Session Category

Cross Discipline

Credits

EA Core: 0.75

EA Non-Core: 0.75

CPD: 1.50

Speakers

- 1 . Ellen L. Kleinstuber Infinity Actuarial Consulting LLC
- 2 . Tonya B. Manning Gallagher
- 3 . Vaidehi Hoyer HUB International
- 4 . Margaret S. Berger Marsh People and Investments
- 5 . Michelle Boyles Bolton

(Session Assistant)

707 - Public Plans Workshop
October 28, 2026 9:30 AM - 10:45 AM

Come share your thoughts as public pension/OPEB actuaries discuss challenges, concerns, and/or perceived solutions to hot topics affecting public plans across the US. Be prepared to participate in polling as well as group discussion.

Session Category

Public Plans

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . William R. Hallmark Cheiron, Inc.
- 2 . Wendy Tucker Ludbrook Cavanaugh Macdonald Consulting LLC

708 - Benefit Suspensions and Return to Work
October 28, 2026 9:30 AM - 10:45 AM

A refresher on the IRS rules regarding suspension of benefits. The panel will also discuss ways that plans encourage later retirements or allow retirees to return to work to address labor shortages.

Session Category

Multiemployer Plans

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . John Michael Redmond Segal
- 2 . Lori R. Waichman Mooney Green Saindon, Murphy & Welch, P.C.
- 3 . Troy Jaros

709 - Will AI Solve All Our (Economic) Problems?
October 28, 2026 9:30 AM - 10:45 AM

The US economic outlook is made uncertain by negative factors such as aging demographics, exploding public debt, and waning globalization. But there is a chance that AI will be the wildcard factor that allows us to prosper in spite of all this. Speakers discuss the impact of AI on work-related tasks and roles, and review emerging research that attempts to project AI's impact on economic growth, employment, and capital markets.

Session Category

Investment

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . R. Evan Inglis The Terry Group
- 2 . Brian Septon Septon Strategies
- 3 . Jerry Mingione The Terry Group

005 - Presidential Remarks & Zap the Generational Gap!
October 28, 2026 11:00 AM - 12:30 PM

The 2026 CCA Annual Meeting concludes with the final remarks of the CCA President, the passing of the gavel to the President Elect, and our capstone presentation by a nationally recognized multi-generational expert and generational studies enthusiast Meagan Johnson. Having a Generational Misunderstanding is nothing new. Many of us have walked away from a multi-generational interaction with less than stellar results. We are left scratching our heads, thinking, “is this a generational issue or a personality problem?” Combined with conflicting generational information and blatant generational stereotypes, it can be a challenge to forge a new path with the multi-generational people in our lives. The truth is, the workforce, and possibly your household, spans across five generations. On one end of the spectrum, the younger generations in the workforce, are beginning their careers during one of the largest global upheavals the world has experienced. On the other end, an entire generation, on the precipice of retirement, is learning how to conduct business in an increasingly digital environment. It can be a struggle to find the right balance between the sometimes-conflicting needs of each generation. Since 1997; Meagan has researched, written and spoken about the multiple generations. Her focus is on how to build a culture of multi-generational collaboration… not alienation. Rather than promoting generational stereotypes, Meagan explores what drives a generation to succeed.

Session Category

Cross Discipline

Credits

CPD: 1.50

Speakers

- 1 . Robert J. Reiskytl
- 2 . Joshua Shapiro Groom Law Group, Chartered
- 3 . Jeremy P. Olszewski Fidelity Investments
- 4 . Meagan Johnson