2022 CCA Annual Meeting

October 16-19, 2022
JW Marriott Austin
Austin, Texas

The Conference of Consulting Actuaries is holding the 2022 CCA Annual Meeting from Sunday, October 16th through Wednesday, October 19th at the JW Marriott Austin in Austin, Texas. Information about this meeting will be available in June of 2022.

Sessions:

001 - Inflation: Back to the Future October 16, 2022 5:15 PM - 6:55 PM

As inflation rears its ugly head, the implications are far reaching. Speakers at this session address inflationary trends at a macro level and the trickle effect on wage inflation, investments, benefit costs and the general cost of doing business. Let's party like it's 1981!

Session Category: Cross Discipline
Credits: EA Non-Core: 2.00 **CPD:** 2.00

Speakers

- 1 . Patricia A. Rotello
- 2 . R. Evan Inglis Pension Benefit Guaranty Corporation
- 3 . Ruth E. Schau Pacific Life Insurance Company
- 4 . Philip Ellis Ellis Health Policy

002 - Business Session and Keynote Presentation by Crystal Washington October 17, 2022 8:00 AM - 10:15 AM

The CCA’s Business Session precedes the Monday General Session with the welcoming of attendees, announcement of new directors and officers, Treasurer’s Report and presentation of the CCA’s annual awards. Our keynote presentation features technology marketing strategist and futurist Crystal Washington. Crystal takes complex social media, app, and web topics, and makes them easy to understand and accessible for everyday people, offering practical tips for using technology to strengthen client connections without losing that personal touch.

Session Category: Cross Discipline
Credits: CPD: 1.50

Speakers

- 1 . Crystal Washington

101 - Required ASOP Disclosures – Practical Applications October 17, 2022 10:45 AM - 12:00 PM

Speakers provide ideas on how to improve your actuarial communications with a focus on ASOPs that affect reports.

Session Category: Retirement
Credits: EA Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Maria M. Sarli WTW
- 2 . Julie M. Ferguson Mercer
- 3 . Frederica S. Daniels USI Consulting Group
- 4 . Brian R. West Newport Group
(Session Assistant)

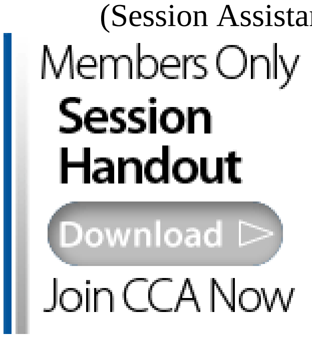
102 - In the Weeds on LDI October 17, 2022 10:45 AM - 12:00 PM

Liability driven investment strategies have been around for almost two decades. Many retirement plan actuaries understand the high-level concept, but few have dug into the details to understand how the actual portfolio is constructed. Speakers in this session walk through the principles for constructing LDI portfolios and the detail of various ways these strategies are put together.

Session Category: Retirement
Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Michael S. Clark Agilis
- 2 . Sweta Vaidya Insight Investment
- 3 . Andrew Lape Agilis
  (Session Assistant)



103 - GASB Primer for Non-Public Plan Actuaries October 17, 2022 10:45 AM - 12:00 PM

Were you ever interested in learning about public plans? How about differences in accounting treatment compared to public and private companies? At this session, practitioners introduce you to accounting in the GASB world.

Session Category: Retirement
Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Stephen N. Eisenstein KPMG
- 2 . David J. Kershner Buck
- 3 . Griffin Lothrop Deloitte Consulting LLP

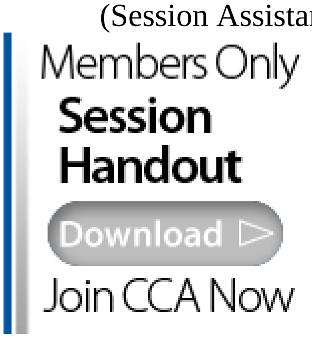
104 - Forecasting in a High Inflationary and Uncertain Environment October 17, 2022 10:45 AM - 12:00 PM

Inflation has been its highest in the last 40 years and the world is recovering from a pandemic that it hasn’t seen in a century. Healthcare cost trends over the next few years will be influenced by these uncertain conditions. What can we learn from recent experience and what should be considered in your selection of short-term cost trends?

Session Category: Health & Welfare
Credits: CPD: 1.50

Speakers

- 1 . Dale H. Yamamoto Red Quill Consulting
- 2 . Philip Ellis Ellis Health Policy
- 3 . Katie Martin Health Care Cost Institute
- 4 . Robert G. Tate Aon
- 5 . Steven W. Guzski Paychex
(Session Assistant)



105 - Being Transparent About Healthcare Transparency October 17, 2022 10:45 AM - 12:00 PM

Beginning July 1, 2022, most group health plans and issuers of group or individual health insurance will begin posting pricing information for covered items and services. A subset of this is the No Surprises Act that became effective on January 1, 2022, and provides patients financial protections against surprise medical bills. Plan sponsors are also responsible for remitting certain prescription drug and healthcare spending information to the government beginning December 27, 2022. Speakers address the effect these factors have on employers and their employees from cost and other perspectives.

Session Category: Health & Welfare
Credits: CPD: 1.50

Speakers

- 1 . Cheryl A. Ham Aon
- 2 . Meghan Rausch Aon
- 3 . Joseph Clark UnitedHealth Group
- 4 . Stephanie Calandro WTW

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106 - Presenteeism and Total Well-Being October 17, 2022 10:45 AM - 12:00 PM

Presenteeism ensures that employers have the people they need to run their business. Employee well-being is an important component of the solution. Panelists define what presenteeism is, why it matters, how to manage it, and the role of well-being in the process.

Session Category: Cross Discipline
Credits: CPD: 1.50

Speakers

- 1 . Phillip A. Merdinger October Three
- 2 . Paul Botkin Lockton Dunning Benefit Company
- 3 . Joel L. Axler Brown & Brown Consulting

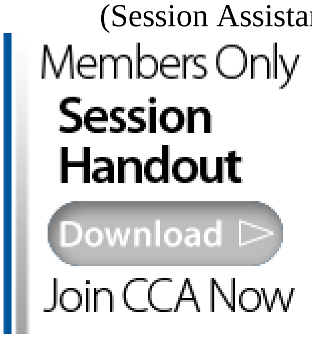
107 - Language Matters: Talking About Political Context October 17, 2022 10:45 AM - 12:00 PM

In public pensions, as in so many areas, without awareness of context and background of political processes, unintended consequences are likely to occur. This session's panel of federal relations experts discuss topics of interest for public pensions related to federal policies and politics. The topics they explore include those most pertinent, including any late breaking developments, but may include federal reimbursement considerations and audits, language related to surplus and funding, pressures to extend single-employer funding rules into the public sector, and market value of liability measures.

Session Category: Public Plans
Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Elizabeth A. Wiley Cheiron, Inc.
- 2 . Leigh Snell National Council on Teacher Retirement
- 3 . Jeannine Markoe Raymond National Assn. of State Retiremt. Admins.
- 4 . Emily Brock Government Finance Officers Association
- 5 . Jody B. Carreiro Osborn Carreiro & Associates, Inc. (Session Assistant)



108 - Mergers and Acquisitions: Impact of the Great Reset on M&A October 17, 2022 10:45 AM - 12:00 PM

Actuaries are uniquely positioned to identify and quantify new trends. Speakers share their experiences in emerging workforce issues created by the Great Reset in the labor market both in the US and globally.

Session Category: International
Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Mike Spetko Deloitte Consulting LLP
- 2 . Eric Warren Wheeler PricewaterhouseCoopers

109 - Dealer's Choice: PBGC on Current Topics October 17, 2022 10:45 AM - 12:00 PM

A panel of PBGC representatives and practitioners discuss SFA regs, 4213 regs, SFA lessons learned, SPILLs, and mergers.

Session Category: Multiemployer Plans
Credits: EA Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Mariah Becker NCCMP
- 2 . James J. Donofrio Pension Benefit Guaranty Corp.
- 3 . R. Evan Inglis Pension Benefit Guaranty Corporation

Develop and Use Your Personal Brand - A Leadership Development Community Luncheon Forum October 17, 2022 12:00 PM - 1:30 PM

Are you ready to take your career to the next level, but unsure what steps to take to get there? Have you already climbed the ladder and are looking to help others grow professionally? Join us for this interactive lunch panel where we'll discuss topics like qualities that help employees stand out; what to consider when taking that next step in your career; what has worked for others to get ahead; how to develop yourself and your personal brand; how to be a better advocate for your team members; and expanding your opportunities.

Session Category: Cross Discipline

Speakers

- 1 . Michael S. Clark Agilis
- 2 . Melissa Chacko New York City Office of the Actuary
- 3 . Justin N. Hornburg Justin Hornburg Consulting
- 4 . Adrienne Cara Ostroff Athena Actuarial Consulting
- 5 . Edward M. Pudlowski MorningStar Actuarial Consulting, LLC

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201 - Current State of Market Cash Balance Plans October 17, 2022 2:00 PM - 3:15 PM

It's been over five years since final regulations were issued for market-based cash balance plans. The IRS recently allowed cash balance plans to file for determination letters. Speakers discuss the current state of affairs with these plans.

Session Category: Retirement
Credits: EA Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Scott A. Hittner October Three LLC
- 2 . Derek Anthony Scott Fidelity Investments

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202 - Multiemployer Plans for Single Employer Actuaries October 17, 2022 2:00 PM - 3:15 PM

Withdrawals, zones, and suspensions, oh my! The world of multiemployer plans can sound like the endangered forest to single employer actuaries. Attend this session and learn as our experts improve your knowledge and rehabilitate you from your fear of these plans.

Session Category: Retirement
Credits: EA Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Richard O. Goehring Richard O. Goehring, Inc.
- 2 . Joshua Shapiro Groom Law Group
- 3 . Mariah Becker NCCMP
- 4 . Carrie Vaughn Milliman Inc
- 5 . Michael I. Helmer Segal (Session Assistant)

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203 - My DB Plan is Frozen: Now What? October 17, 2022 2:00 PM - 3:15 PM

Many of us are working with several frozen pension plans. Once a pension plan is frozen, what's next? Speakers detail the path of a pension plan from frozen to termination. They also address strategies on DC plan designs that can help address the loss of the DB plan.

Session Category: Retirement
Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Katy Aronova Prudential Financial
- 2 . Ruth E. Schau Pacific Life Insurance Company
- 3 . Alexandra Hyten Prudential Financial
- 4 . Stacey Marie Schmid Empower
- 5 . Andrew Lape Agilis

(Session Assistant)

204 - Current Topics in Medicare Advantage and Part D October 17, 2022 2:00 PM - 3:15 PM

Speakers highlight current topics in Medicare Advantage and Part D using an interactive format including presentations, polling, and audience participation. Topics may include Medicare Advantage, Part D, and employer sponsored Medicare plans.

Session Category: Health & Welfare
Credits: CPD: 1.50

Speakers

- 1 . David M. Tuomala Optum
- 2 . Dan Hoffman Optum
- 3 . Martin W. Hill PricewaterhouseCoopers LLP
- 4 . Shyam Kolli Milliman Inc.
- 5 . Kevin Johnson Optum
(Session Assistant)

205 - Individual Marketplace Updates Opportunities October 17, 2022 2:00 PM - 3:15 PM

The individual insurance market continues to see significant, positive change. One example is the newly signed Inflation Reduction Act, which further improves the value of individual insurance and creates new opportunities for plan sponsors. Speakers at this session provide updates on the market's current state as well as projections for its future evolution. Consultant, carrier, and technology perspectives will help identify and understand ways for employers to drive a more valuable, efficient, and comfortable participant experience.

Session Category: Health & Welfare
Credits: CPD: 1.50

Speakers

- 1 . Trevis G. Parson WTW
- 2 . Ryan Jessell WTW
- 3 . Michael W. Levin Ideon
- 4 . Christine Kourouklis Blue Cross/Blue Shield of IL, TX, OK, NM & MT

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206 - Identifying and Assessing Bias in Pension and Healthcare October 17, 2022 2:00 PM - 3:15 PM

The revised US Qualification Standards (USQS) that are effective as of January 1, 2022 include an annual one hour bias topics continuing education requirement. Following a brief introduction discussing the evolution and implications of this requirement in the USQS, our speakers discuss several types of bias, including specific examples from both the retirement and health practices. We hope that all attendees leave with not only their bias topics requirement satisfied for 2022, but also with a keener understanding of how biases may emerge in actuarial practice.

Session Category: Cross Discipline
Credits: CPD: 1.50

Speakers

- 1 . Justin N. Hornburg Justin Hornburg Consulting
- 2 . Thomas S. Terry The Terry Group
- 3 . Elizabeth A. Wiley Cheiron, Inc.
- 4 . Yi-Ling Lin The Terry Group
- 5 . Robert (Andy) Blough Indiana Public Retirement System (Session Assistant)

207 - Impact of Recent ASOP 4 Changes on Public Plans October 17, 2022 2:00 PM - 3:15 PM

After three Exposure Drafts, in February 2022 the ASB released a substantially revised ASOP 4, which includes the required disclosure of a market return based liability measure. Other new requirements include enhanced assessments of a plan's funding policy, and disclosure of an actuarially determined contribution by all pension plans. These new disclosures are particularly revolutionary for public pension plans. Panelists explore possible consequences and strategies for meeting these new requirements.

Session Category: Public Plans
Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Paul Angelo Segal
- 2 . William R. Hallmark Cheiron, Inc.
- 3 . Brent A. Banister Cavanaugh Macdonald Consulting LLC
- 4 . Christine M O'Neal Deloitte Consulting LLP
  (Session Assistant)

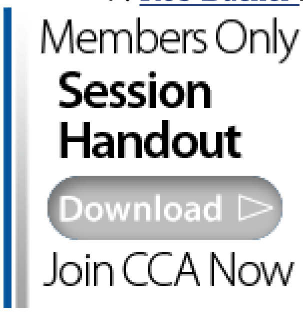
208 - Carving Out a New Company October 17, 2022 2:00 PM - 3:15 PM

A new company is born... speakers discuss the multitude of HR issues to address when splitting a portion of a global business to create a new company. What it takes to get it done while making it seamless for employees.

Session Category: International
Credits: EA Non-Core: 1.00 **CPD:** 1.50

Speakers

- 1 . Jonathan P. Lincoln WTW
- 2 . Edgar Friedman Deloitte Consulting LLP
- 3 . Jonathan McMurray WTW
- 4 . Rob Bacher KPMG LLP



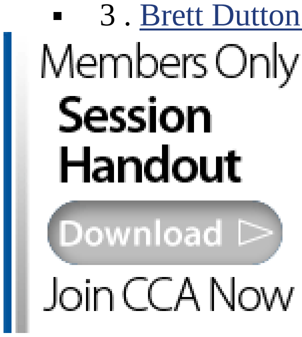
209 - Pension Investing in a Changing World October 17, 2022 2:00 PM - 3:15 PM

The evolving capital market outlook and interest rate environment pose new challenges to pension plans. How are plan sponsors applying liability-driven investment strategies in the current environment? How are emerging asset classes such as alternatives being used to improve risk/reward performance? The panel reviews case studies on how plan sponsors navigate these challenges, using tools such as efficient frontiers, asset segmentation, hedge ratio targets, futures overlays, and glide paths.

Session Category: Investments
Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Yubo Qiu Principal Financial Group
- 2 . Jonathan R. Barry MFS Investment Management
- 3 . Brett Dutton Vanguard



301 - Nerdle for Actuaries (aka ERISA Trivia) October 17, 2022 3:45 PM - 5:00 PM

In two years ERISA will turn 50 years old. Whether you are under age 50 or already have passed that mark, don't let a refined knowledge of ERISA remain on your actuarial bucket list. Attend this session and start scratching that item off this year.

Session Category: Retirement
Credits: EA Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Richard O. Goehring Richard O. Goehring, Inc.
- 2 . Maria Clarice Chua Fidelity Investments
- 3 . Maria E Simmers Buck
- 4 . Matthew Sampogna Principal Financial Group
- 5 . Samantha Klingler Mercer

302 - Plan Terminations - Understanding the Investment Considerations October 17, 2022 3:45 PM - 5:00 PM

Pension plan actuaries have a good understanding of the legal, compliance, and actuarial aspects of plan terminations. But managing a plan's funded status during the termination process also requires actuaries to understand the investment considerations. Speakers address what drives the investment decisions that need to be made and what actuaries can do to ensure that your clients don't end up with funded status surprises during the termination process. We'll look at asset allocation decision points, what drives the ultimate settlement cost, and how the investment strategy can hedge against unexpected surprises when the final contribution comes due.

Session Category: Retirement
Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Michael S. Clark Agilis
- 2 . Jeffrey G. Passmore MetLife Investment Management
- 3 . David R. Cantor Mercer

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303 - Cost Accounting Standards for Government Contractors October 17, 2022 3:45 PM - 5:00 PM

Government contractors obtain reimbursement under specified rules that cover ongoing reimbursement and other special situations. Panelists review the logistical issues associated with complying with these rules and highlight areas that may be potential pitfalls, including discussion of any recent developments.

Session Category: Retirement
Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Craig P. Rosenthal Mercer
- 2 . Grace Barbieri Mercer
- 3 . Denise M. Widergren Defense Contract Management Agency

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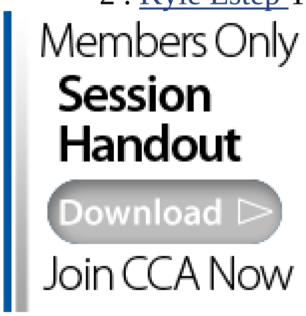
304 - ICHRA: What, Why, Huh? October 17, 2022 3:45 PM - 5:00 PM

Imagine you're an employer entering the US healthcare system for the first time. How would you choose what health plan to offer? How would you fund it? Would the old method be the way? Speakers take you through a new alternative - the Individual Coverage HRA (ICHRA). This approach to meeting your financial requirements without the complications of managing a group health plan. Is it for you? Join us and find out why you should consider a different path forward.

Session Category: Health & Welfare
Credits: CPD: 1.50

Speakers

- 1 . Alan J. Silver WTW
- 2 . Kyle Estep Take Command Health



305 - Why Should I Care About Value-Based Care? Understanding and Evaluating Value-Based Care Models October 17, 2022 3:45 PM - 5:00 PM

Speakers address consultant considerations when evaluating value-based care arrangements. Topics include an overview of the value-based care market; considerations for evaluating these arrangements; practical evaluation examples; discussion around what's coming in value-based care, and a panel discussion with your questions and answers.

Session Category: Health & Welfare
Credits: CPD: 1.50

Speakers

- 1 . John McAndrew Lockton Companies
- 2 . Sara Corrough Teppema Wildflower Health
- 3 . Mark Wernicke ThedaCare
- 4 . Michael Nugent Guidehouse

306 - What Actuaries Should Know About Climate Change October 17, 2022 3:45 PM - 5:00 PM

Climate-related risks arise when various direct and indirect climate-related impacts affect the physical resources or assets of individuals or entities. When climate impacts also interact with various socioeconomic systems, the result may disrupt the mechanisms traditionally used to maintain financial stability. To an actuary that means assumptions may change or may need further disclosure, especially with growing regulator focus and the focus on climate-related financial disclosures across many insurance and financial services industries. The panelists cover the Actuaries Climate Index (ACI); discuss the Actuaries Climate Risk Index (ACRI); highlight the evolution of actuarial research on these topics including six climate issue papers promulgated by the International Actuarial Association; and explain what actuaries from all disciplines need to know about climate change including disclosures proposed or considered by various regulators.

Session Category: Cross Discipline
Credits: CPD: 1.50

Speakers

- 1 . Margaret Tiller Sherwood Tiller Consulting Group Inc.
- 2 . R. Dale Hall Society of Actuaries
- 3 . Lisa A. Slotznick
- 4 . Vaidehi Amit Hoyer Agilis
  (Session Assistant)

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307 - Social Security Considerations for Public Pensions October 17, 2022 3:45 PM - 5:00 PM

Speakers discuss issues related to the intersection of Social Security and public pension plans. Topics include FICA Replacement Plan requirements, including the Safe Harbors, mandatory coverage, and Section 218 Agreements. Additionally, the implications of the Government Pension Offset (GPO) and the Windfall Elimination Provision (WEP) on these topics are also addressed.

Session Category: Public Plans
Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Elizabeth A. Wiley Cheiron, Inc.
- 2 . Jeannine Markoe Raymond National Assn. of State Retiremt. Admins.
- 3 . Sandy Matheson
- 4 . Audra Ferguson-Allen Ice Miller LLP
- 5 . Amelia L. Williams Gabriel Roeder Smith & Company (Session Assistant)

308 - Employee Well-Being in M&A Situations: A Global Perspective October 17, 2022 3:45 PM - 5:00 PM

An M&A event can be an exciting time for the workforce. That excitement, however, can bring uncertainty for employees and this can affect their well-being. Speakers discuss effective strategies for maintaining and enhancing employee well-being during an M&A event and why they matter. In addition, they explore what companies can do for employee well-being during a transaction and how companies can keep the momentum of well-being focus after the transaction when business-as-usual is achieved.

Session Category: International
Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . James L. Jones EY
- 2 . Katherine Ortiz CBRE
- 3 . Dean W. Kepraios WTW

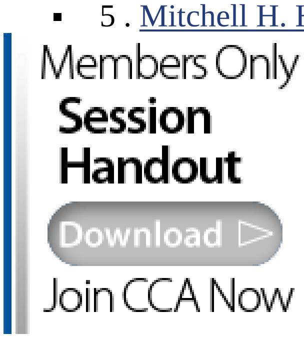
309 - Dueling Actuaries October 17, 2022 3:45 PM - 5:00 PM

Watch actuaries debate late-breaking issues affecting multiemployer actuaries. After each topic is addressed, the audience votes for the winner of each subject.

Session Category: Multiemployer Plans
Credits: EA Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Troy Jaros National Professional Planning Group, Inc.
- 2 . Joshua Shapiro Groom Law Group
- 3 . James J. McKeogh The McKeogh Company
- 4 . Scott Phillip Steadman Bolton Partners, Inc.
- 5 . Mitchell H. Hofing



401 - Administrative Grab Bag and Case Studies October 18, 2022 8:00 AM - 9:40 AM

The speakers touch on a variety of complex and sometimes overlooked administrative issues including handling non-spouse beneficiaries and deferred beneficiaries; plan termination data readiness; and using the new RMD rules. Questions are welcome as we review interactive case studies.

Session Category: Retirement
Credits: EA Core: 2.00 **CPD:** 2.00

Speakers

- 1 . Jaime F. Packer USI Consulting Group
- 2 . Jamie Michelle Sloat Mercer
- 3 . Spencer Wade Fidelity Investments

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402 - Advanced Topics in Accounting for Defined Benefit Retirement Plans October 18, 2022 8:00 AM - 9:40 AM

Accounting for Defined Benefit plans is not always easy. Accounting firm professionals discuss advanced topics they experienced in client situations, considerations, and resolutions reached. Be prepared for an interactive session.

Session Category: Retirement
Credits: EA Non-Core: 2.00 **CPD:** 2.00

Speakers

- 1 . Stephen N. Eisenstein KPMG
- 2 . Philip Bonanno Grant Thornton LLP
- 3 . Ellen Fogarty Deloitte Consulting LLP
- 4 . Andrew Christian Etheridge Grant Thornton LLP (Session Assistant)

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403 - DC Plan Nondiscrimination Testing October 18, 2022 8:00 AM - 9:40 AM

ADP, ACP, QSLOB, cross testing, gateway testing, plan aggregation, and QNECs are all common terms used in testing defined contribution plans. Come to this session to learn what these terms mean and how to navigate some of the more advanced nondiscrimination testing situations for DC plans.

Session Category: Retirement
Credits: EA Non-Core: 2.00 **CPD:** 2.00

Speakers

- 1 . Jeremy P. Olszewski Fidelity Investments
- 2 . Donna Kropf Mercer
- 3 . Dan Froehlich Fidelity Investments
- 4 . Patrick Blanchard Alvarez & Marsal
- 5 . Rebecca Bak Fidelity Investments (Session Assistant)

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404 - Catching Up With Health Equity - What Are We Talking About? October 18, 2022 8:00 AM - 9:40 AM

Haven't had time to get up to speed on health equity? Health equity is an important issue that has the industry, researchers, government and everyday people talking about it. Catch up on the learnings so far and where health equity is heading from an actuarial perspective.

Session Category: Health & Welfare
Credits: CPD: 2.00

Speakers

- 1 . Yi-Ling Lin The Terry Group
- 2 . James Dolstad Optum
- 3 . Sara Corrough Teppema Wildflower Health
- 4 . Donna C. Novak NovaRest Actuarial Consulting

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405 - Prescription Drug Update: PBM Pharmacagenomics October 18, 2022 8:00 AM - 9:40 AM

Panelists provide a pharmacy update with emerging trends in benefit management, pharmacogenomics, and other genetics-related work.

Session Category: Health & Welfare
Credits: CPD: 2.00

Speakers

- 1 . Ian M. Smith Optum
- 2 . Ray Stultz Optum
- 3 . David S. Armstrong SomaLogic
- 4 . Sarah Suzanne Hellems Optum Pharmacy Advisory Services

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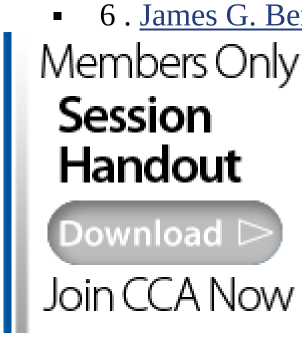
406 - Problem Solving Roundtable: Saving Social Security October 18, 2022 8:00 AM - 9:40 AM

Absent any legislative action, Social Security benefits are expected to decrease by about 25% in 2033. With an eye toward addressing this problem, panelists discuss different levers we could pull to make Social Security solvent. Should we increase taxes? Cut benefits? A bit of both? We'll use polling to gather input to serve as the starting point for a Social Security reform package to be presented to lawmakers. Let's harness the brainpower of actuaries and help make a difference.

Session Category: Cross Discipline
Credits: CPD: 2.00

Speakers

- 1 . Justin N. Hornburg Justin Hornburg Consulting
- 2 . Patricia A. Rotello
- 3 . Erica Peters Apple
- 4 . Craig P. Rosenthal Mercer
- 5 . Jonathan R. Barry MFS Investment Management
- 6 . James G. Berberian Buck



407 - COVID-19: Impact on Demographic Assumptions October 18, 2022 8:00 AM - 9:40 AM

COVID-19 has had an unprecedented impact on operations of our principals, forcing actuaries to re-assess assumptions and inputs used in actuarial models. Speakers at this session review multiple perspectives on how COVID-19 has impacted pension and OPEB assumptions. The panelists detail COVID-19 trends in mortality and retiree healthcare costs, employee turnover, payroll growth, and other assumptions. Gain a broader view on latest trends in accounting for COVID-19 impact on mortality, morbidity and other experience by attending this session.

Session Category: Public Plans
Credits: EA Non-Core: 2.00 **CPD:** 2.00

Speakers

- 1 . Todd David Kanaster S&P Global
- 2 . Kevin Scott Spanier Buck
- 3 . Adrienne Cara Ostroff Athena Actuarial Consulting
- 4 . Piotr Krekora Gabriel Roeder Smith & Company
- 5 . Craig T. Chu Cheiron, Inc.
- 6 . Brett Michael Hunter Buck Global LLC
  (Session Assistant)

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408 - Professionalism in a Diverse World October 18, 2022 8:00 AM - 9:40 AM

The incorporation of diversity, equity, and inclusion in corporate culture is a global movement. But how is diversity viewed globally? What approaches to increased diversity have global companies taken? What is the intersection of professionalism and DE&I? Speakers from consulting and corporate environments discuss these issues and how approaches to DE&I differ globally.

Session Category: International
Credits: CPD: 2.00

Speakers

- 1 . James L. Jones EY
- 2 . Douglas J. Carey
- 3 . Catherine Lyn
- 4 . Renata De Leers
- 5 . Dwayne Husbands Ernst & Young LLP
- 6 . Geoff Bridges Segal
  (Session Assistant)

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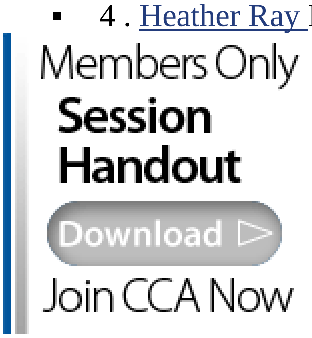
409 - Assembly of a Successful SFA Application October 18, 2022 8:00 AM - 9:40 AM

2014's Multiemployer Pension Reform Act (MPRA) broke all the rules, allowing multiemployer pension funds to reduce accrued benefits - even those in pay status! The application and political processes were shattering; 18 pension funds were successful. 2021's American Rescue Plan Act essentially ended that with the advent of "special financial assistance" (SFA) and priority categories. While not quite as intense as MPRA, SFA applications are rather complex. Hear from actuaries who have completed successful SFA applications in the earliest priority categories.

Session Category: Multiemployer Plans
Credits: EA Core: 2.00 **CPD:** 2.00

Speakers

- 1 . Jay K. Egelberg First Actuarial Consulting, Inc.
- 2 . Vincent Anthony Regalbuto O'Sullivan Associates
- 3 . Nadine Solntseva First Actuarial Consulting, Inc.
- 4 . Heather Ray Horizon Actuarial Services, LLC



501 - Late Breaking Developments October 18, 2022 10:10 AM - 11:50 AM

Speakers discuss the latest developments in the private pension sector. Recent rulings and regulations - proposed and final - are covered in addition to pending retirement plan legislation and recent litigation activity.

Session Category: Retirement
Credits: EA Core: 2.00 **CPD:** 2.00

Speakers

- 1 . Jeremy P. Olszewski Fidelity Investments
- 2 . Margaret S. Berger Mercer
- 3 . Madi Smith WTW
- 4 . Marcy Bloodgood Buck

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502 - Actuarial Valuation of Variable Annuity and Market Cash Balance Plans October 18, 2022 10:10 AM - 11:50 AM

The economic value of variable annuity and market-based cash balance plans significantly differs from traditional defined benefit plans. Many of these plans contain provisions that are difficult to value using traditional valuation techniques. Speakers address the actuarial valuation of these plan designs.

Session Category: Retirement
Credits: EA Core: 2.00 **CPD:** 2.00

Speakers

- 1 . Scott A. Hittner October Three LLC
- 2 . Bruce Cadenhead Mercer
- 3 . David Murad NISA

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503 - Plan Mergers and Spinoffs for DB and DC Plans (Frozen and Active Plans) October 18, 2022 10:10 AM - 11:50 AM

Many sponsors have multiple retirement plans, and in several situations it might make sense to merge them. Similarly, there may be situations where it might make sense to transfer liabilities among plans.

Session Category: Retirement
Credits: EA Core: 1.00 **EA Non-Core:** 1.00 **CPD:** 2.00

Speakers

- 1 . Craig P. Rosenthal Mercer
- 2 . Marina Edwards Marina Retirement, LLC
- 3 . Frederick W Lamm WTW
- 4 . Julie Sachs Aon

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504 - COVID 19 Implications from Pandemic to Endemic October 18, 2022 10:10 AM - 11:50 AM

Learn about the impact of the COVID-19 pandemic on health care claims patterns, provider approaches and future cost projections. Understand the implications of continued COVID infections, vaccines, and the eventual shift to an endemic disease. Consider the impacts of long COVID on experience.

Session Category: Health & Welfare
Credits: CPD: 2.00

Speakers

- 1 . Tim Stawicki WTW
- 2 . Peter Sanderson Aetna
- 3 . Christine M. Hale Lockton Dunning Benefits
- 4 . Elodie Olsen WTW

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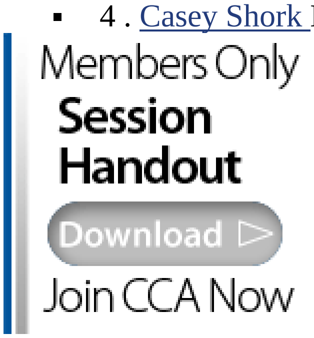
505 - Retiree Medical - What is the Auditor Looking For October 18, 2022 10:10 AM - 11:50 AM

If your client has a Big Four auditor, gone is the day when the annoying first year accountant asked irrelevant questions. Anticipating and knowing what the auditor's actuarial specialist is looking for can go a long way toward a smoother completion to year-end financial reporting.

Session Category: Health & Welfare
Credits: CPD: 2.00

Speakers

- 1 . John J. Schubert Deloitte Consulting LLP
- 2 . Martin W. Hill PricewaterhouseCoopers LLP
- 3 . Steven D. Draper Ernst & Young, LLP
- 4 . Casey Shork KPMG



506 - The New Workforce Relationship October 18, 2022 10:10 AM - 11:50 AM

Trying to balance an employer's need for talent with employee's expectations is becoming even more challenging. How will the experience of remote working during the pandemic impact the future workplace, whether physical or virtual? What are some of the solutions to address staffing needs and employees' needs? Is the financial cost resulting from the Great Resignation sustainable? What will the total reward system look like that satisfies these conflicting goals?

Session Category: Cross Discipline
Credits: CPD: 2.00

Speakers

- 1 . Lauren Elizabeth Klein Fidelity Investments
- 2 . Riddhi Patel The Walt Disney Company
- 3 . Eric M. Pudlowski Mercer
- 4 . Amy Ruth Guidewell
- 5 . Sweta Vaidya Insight Investment

- 6 . Patricia A. Rotello
- 7 . Phillip A. Merdinger October Three

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507 - "What's My Line?" - Recent Research on Public Sector Plans October 18, 2022 10:10 AM - 11:50 AM

What is their line? Or in this case, opinion? Join us as our participants review and debate the finer points of recent research papers covering topics relevant to public plans. Come, listen, question, AND VOTE on key concepts highlighted by the presenters regarding funding, sustainability, and fiscal stress as it impacts the public plan arena. (Review Papers: Enhancing Sustainability of Public Pensions, NCPERS, January 2022, and Addressing and Avoiding Severe Fiscal Stress in Public Pension Plans, Urban Institute, January 2022.)

Session Category: Public Plans
Credits: EA Non-Core: 2.00 **CPD:** 2.00

Speakers

- 1 . Koren L. Holden Colorado PERA
- 2 . Dana Lynn Woolfrey Gabriel Roeder Smith & Company
- 3 . Todd N. Tauzer Segal
- 4 . William B. Fornia Pension Trustee Advisors
- 5 . Jolene Roe Deloitte Consulting LLP
  (Session Assistant)

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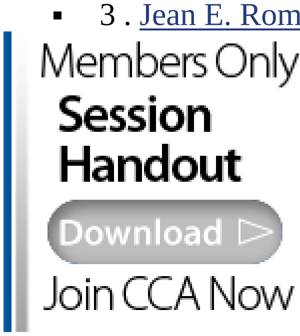
508 - Global DC Plan Governance and Retirement Planning Around the World October 18, 2022 10:10 AM - 11:50 AM

DC plans have become the primary approach to providing retirement benefits around the world. However, many employees are not adequately prepared for retirement in the face of weakening social pension systems, low interest rates, and an overvalued stock markets. Many employees find themselves ill prepared or unable to retire due to inadequate financial resources or psychological unpreparedness for change in lifestyle and family dynamics. Employers have a direct stake in their employee's successful planning for retirement to improve employee engagement and financial and mental wellness as well as to reduce costs and risks of potential labor disputes typically involved in having to retire with older populations. In this session, panelists provide an overview of how companies are effectively managing their DC plans around the world. Speakers then focus on the retirement planning support offered by company pension programs globally and trends in employee education, voluntary long-term savings features, EAP programs and other employer initiatives typically used around the world.

Session Category: International
Credits: EA Non-Core: 2.00 **CPD:** 2.00

Speakers

- 1 . Vaibhavi V. Patel WTW
- 2 . Rachel Gift Amalo WTW
- 3 . Jean E. Roma Citigroup



509 - Whither Go Return Expectations? October 18, 2022 10:10 AM - 11:50 AM

Capital market model return expectations took a nose-dive over the past year or two due to historically low interest rates and historically high pricing levels. But now capital markets are shifting again, and rather dramatically, with runaway inflation and the monetary policy shift aimed at controlling it. How is all this turbulence affecting retirement program financing? What about individuals trying to fund their own retirements?

Session Category: Investments
Credits: EA Non-Core: 2.00 **CPD:** 2.00

Speakers

- 1 . Jerry Mingione The Terry Group
- 2 . Ken Yager Graystone Consulting

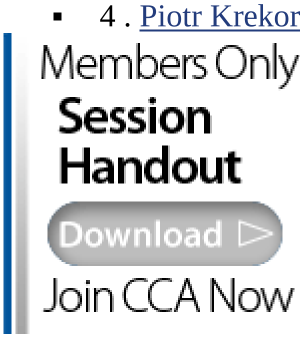
003 - Ethics October 18, 2022 1:00 PM - 2:40 PM

Come get your 2.0 EA Ethics credit as we discuss case studies covering ethical challenges and dilemmas facing pension actuaries. Audience participation is highly encouraged.

Session Category: Retirement
Credits: EA Ethics: 2.00 **CPD:** 2.00

Speakers

- 1 . John Malcolm Merrill Nicolay Consulting Group
- 2 . Rachel Barnes Nyhart
- 3 . Jay K. Egelberg First Actuarial Consulting, Inc.
- 4 . Piotr Krekora Gabriel Roeder Smith & Company



004 - Professionalism for Healthcare Actuaries October 18, 2022 1:00 PM - 2:40 PM

This interactive session covers professional/ethical case studies (sometimes real life ones) where consultants are faced with challenging client situations. Discussions and polling allow the audience the opportunity to decide the best course of action to take and why. Any applicable ASOPs are also addressed.

Session Category: Health & Welfare
Credits: CPD: 2.00

Speakers

- 1 . Tanya E. Sun Aon
- 2 . Dean W. Kepraios WTW
- 3 . Jennifer Nelson Schaefgen American Benefits Consulting
- 4 . Tiffany Arnold Aon
- 5 . Derek N. Guyton
- 6 . Cheryl A. Ham Aon
- 7 . Ian G. Duncan University of California - Santa Barbara
- 8 . Dale H. Yamamoto Red Quill Consulting
- 9 . Justin N. Hornburg Justin Hornburg Consulting

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Inclusive Conversations – A Women in Consulting Community Forum October 18, 2022 4:00 PM - 5:00 PM

Conversations and the words we use help to foster an inclusive environment. That is why it is important to realize why the words that you choose matter when you are an ally in the workplace. During this forum, panelists explore microaggressions, discuss how allies can create a more inclusive environment through their words, and demonstrate how we can all learn from our own mistakes.

Session Category: Cross Discipline

Speakers

- 1 . Tonya B. Manning Buck
- 2 . Emojoy Brown BlackRock
- 3 . Adrienne Cara Ostroff Athena Actuarial Consulting

601 - Plan Terminations for Small Plans October 19, 2022 8:00 AM - 9:15 AM

Panelists review the process for terminations of small plans, including PBGC requirements and processes, choosing the plan termination date and special funding rules for terminating plans. Speakers also review the strategies that can be used for plans that are either underfunded or overfunded.

Session Category: Retirement
Credits: EA Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Lance Paul Roteman National Professional Planning Group
- 2 . Kevin Joseph Donovan Pinnacle Plan Design, LLC
- 3 . Scott Grenier
- 4 . Ben A. Johnson

602 - Plan Termination: Winding Down Nonqualified Plans October 19, 2022 8:00 AM - 9:15 AM

There are a host of issues to face when considering winding down and terminating a nonqualified plan. In many cases the relevant considerations and challenges for a nonqualified plan are the opposite of a qualified plan. Panelists address the strategy, decision points, timing, and steps that need to be considered, including a transfer of investment and mortality risk and reduction of financial statement volatility.

Session Category: Retirement
Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . David Scharf Buck
- 2 . Pete J. Neuwirth CapAcuity
- 3 . Russell S. Proctor Pacific Life Insurance Co.

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603 - Strategic Plan Design for DC Plans October 19, 2022 8:00 AM - 9:15 AM

Panelists cover the plan design of a Defined Contribution program that meets both employee and employer retirement needs and can also be used as a tool for employer recruiting and retention. They also discuss the design of combination DB/DC plans as well as important plan features such as auto enrollment and escalation, portfolio design, participant education, benefit portability and other plan design features.

Session Category: Retirement
Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Tonya B. Manning Buck
- 2 . Robert J. Reiskytl Aon
- 3 . Lisa M. Canafax Mercer
- 4 . Ruth E. Schau Pacific Life Insurance Company

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604 - Virtual Care in a Virtual World October 19, 2022 8:00 AM - 9:15 AM

Health care has been rendered via virtual channels since the emergence of telephone and radio technology. Although its usage since then has varied across different eras and settings, recent forces such as the COVID pandemic, recognition of generational preference patterns, and care equity initiatives have accelerated the use of virtual care. Panelists dissect several aspects of the value proposition for virtual care, exploring exciting topics such as its role in various care scenarios, integration with in-person treatment, emerging frameworks, and the outlook of what's next in virtual care.

Session Category: Health & Welfare
Credits: CPD: 1.50

Speakers

- 1 . Stephanie Calandro WTW
- 2 . Anne E. Crumlish Aetna
- 3 . Debra Friesen Kaiser Permanente
- 4 . Courtney A. Stubblefield WTW
- 5 . Steven F. Cyboran Humaculture, Inc. (Session Assistant)

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605 - Large Employer Benefit Trends October 19, 2022 8:00 AM - 9:15 AM

Panelists provide their observations on large employer trends in 2022 and beyond, touching on the effects of COVID-19 on benefits such as lasting changes to virtual care and behavior health. Additionally we'll walk through what can be done to help clients with DE&I initiatives in the benefits space.

Session Category: Health & Welfare
Credits: CPD: 1.50

Speakers

- 1 . Jennifer Leming One Medical
- 2 . Stephanie A. Beach Mercer
- 3 . Justin N. Hornburg Justin Hornburg Consulting

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606 - Business Development Workshop October 19, 2022 8:00 AM - 9:15 AM

While sales is a dirty word for many consultants, business development is a necessary skill. Panelists provide a lively discussion on developing relationships and sales skills to enhance client relationships and improve business win rates.

Session Category: Cross Discipline
Credits: CPD: 1.50

Speakers

- 1 . Patricia A. Rotello
- 2 . Paul M. Sepe WTW
- 3 . Tanya Rizzuto Colgate-Palmolive
- 4 . Edward M. Pudlowski MorningStar Actuarial Consulting, LLC

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607 - Pre-funding Government OPEB Plans October 19, 2022 8:00 AM - 9:15 AM

Unlike pensions, setting aside significant assets for retiree health plans isn't as common. Speakers discuss some of the reasons for and against prefunding. Some of the topics include trends in funding, trust vehicles, funding policies, discount rate setting, and unwinding trusts.

Session Category: Public Plans
Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Michael J. de Leon Deloitte Consulting LLP
- 2 . Maureen Toal Public Agency Retirement Services
- 3 . Linda L. Bournival KMS Actuaries, LLC
- 4 . Joseph Michael Kropiewnicki Deloitte Consulting LLP (Session Assistant)

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608 - Non-Traditional Global Roles for Actuaries Part 1: Global Actuary October 19, 2022 8:00 AM - 9:15 AM

In the first part of a series to provide alternative career tracks to actuaries in the global arena, a panel of international consulting actuaries highlight their experience service as global actuary and advisor for multinational clients and the differences between the domestic and international actuarial practice.

Session Category: International
Credits: CPD: 1.50

Speakers

- 1 . Mitsuyasu Nishiwaki WTW
- 2 . Douglas J. Carey
- 3 . Albert R. Phelps Gallagher

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609 - Variable Benefit Plans - Innovative Designs for Risk Sharing October 19, 2022 8:00 AM - 9:15 AM

Speakers continue the discussion about variable annuity plans in the multiemployer space. Given the recent volatility in the markets, funds are more interested than ever in finding new ways to protect and strengthen their plans. Panelists provide a deeper dive into the variable plan designs being implemented and how best to apply these creative solutions.

Session Category: Multiemployer Plans
Credits: EA Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Bryan McCormick CBIZ Retirement Plans Services
- 2 . Scott Phillip Steadman Bolton Partners, Inc.
- 3 . John Michael Redmond Segal
- 4 . Thomas C. Cliffel Horizon Actuarial Services, LLC

701 - Working With the PBGC October 19, 2022 9:30 AM - 10:45 AM

Panelists discuss important topics and issues relating to single-employer plans and PBGC that an actuary or the actuary's plan sponsor client may face. Drawing on their own experiences, speakers discuss recent updates, and provide practice tips and best practices for working with PBGC. Topics include the implication of economic conditions on PBGC-related issues, standard terminations, distress and involuntary terminations, the Early Warning Program, reportable events, 4062(e) liability, coverage, recent guidance and developments, and the Advocate.

Session Category: Retirement
Credits: EA Core: 1.50 **CPD:** 1.50

Speakers

- 1 . John Malcolm Merrill Nicolay Consulting Group
- 2 . Katherine B. Kohn Groom Law Group
- 3 . Matthew Robert Fishel Mercer

- 4 . Israel Goldowitz Wagner Law Group
- 5 . Victor John Buonopane Goldman Sachs & Co. (Session Assistant)

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702 - Legal and Regulatory Issues for Nonqualified Plans October 19, 2022 9:30 AM - 10:45 AM

Nonqualified plans have unique regulatory and legal considerations that are quite different (sometimes even opposite) from qualified plans. A panel of actuarial and legal experts in nonqualified plans address key issues, including IRC Sections 409A, 457(f), and 162(m), funding and tax implications, and reporting requirements with SEC and IRS.

Session Category: Retirement
Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . David Scharf Buck
- 2 . Joseph S. Adams Winston & Strawn LLP
- 3 . Erik B. Lundgren Jones Day
- 4 . Aaron J.L. Pedowitz Mercer

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703 - Decumulation in DC Plans October 19, 2022 9:30 AM - 10:45 AM

Most plan sponsors have helped participants focus on the accumulation of retirement assets. Our speakers discuss strategies plan sponsors can think about while trying to help plan participants draw down on accumulated funds, in the presence or absence of an annuity.

Session Category: Retirement
Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Felix A. Okwaning Principal Financial Group
- 2 . Charles E.F. Millard Annexus Retirement Solutions
- 3 . Stacey Marie Schmid Empower
- 4 . Pete J. Neuwirth CapAcuity

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704 - Succeeding in the New Healthcare Economy Through Advanced Analytics October 19, 2022 9:30 AM - 10:45 AM

Employers and other healthcare organizations increasingly look for actuaries to provide them with quantitative information of value to drive decision making. Our experts offer their perspectives on the demand for advanced analytics in the rapidly approaching value-based future.

Session Category: Health & Welfare
Credits: CPD: 1.50

Speakers

- 1 . Linh Duong Ebbers WTW
- 2 . Aaron Brunson WTW
- 3 . Scott Rabin Mercer
- 4 . Kari Johnson Providence
- 5 . Nick Pearce McGriff (Session Assistant)

705 - Social Determinants of Health: Update on SOA Research October 19, 2022 9:30 AM - 10:45 AM

The Society of Actuaries published research papers on Social Determinants of Health (SDOH) earlier this year. Authors of those papers highlight their key findings. In addition, the researchers cover the relevance of SDOH to actuaries and summarize the publicly available data sources that can be used in actuarial models.

Session Category: Health & Welfare
Credits: CPD: 1.50

Speakers

- 1 . James Dolstad Optum
- 2 . Sara Corrough Teppema Wildflower Health
- 3 . Joan C. Barrett Axene Health Partners, LLC

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706 - Social and Emotional Intelligence in Actuaries October 19, 2022 9:30 AM - 10:45 AM

In our increasingly digital world, the human element continues to help distinguish actuaries from algorithms. What is your adaptability quotient? Your emotional quotient? What do these designations mean, and why are they important? Panelists explore why it is important that these human elements are an essential part of professional development for actuaries.

Session Category: Cross Discipline
Credits: CPD: 1.50

Speakers

- 1 . Thomas S. Terry The Terry Group
- 2 . Paul M. Sepe WTW
- 3 . Philip Blue Wright Foundation
- 4 . Rebecca O'Loughlin Trauger Buck

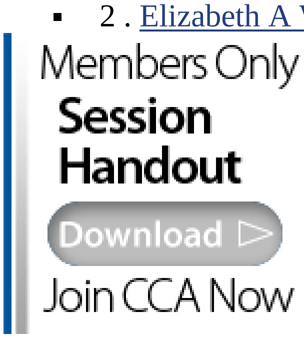
707 - Public Plans Workshop October 19, 2022 9:30 AM - 10:45 AM

This is an open forum on topics of interest to public sector actuaries. The topics are selected by session attendees and may include: funding to surplus; volatility management; impact of higher interest rates on plan design; economic assumptions including ASOP 27; and ASOP 4's low-default-risk obligation measure (LDROM).

Session Category: Public Plans
Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Lance J. Weiss Gabriel Roeder Smith & Company
- 2 . Elizabeth A Wiley Buck



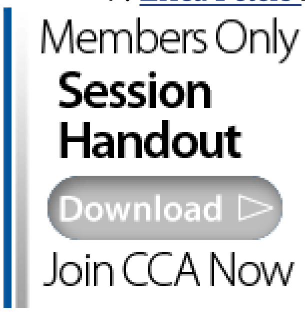
708 - Non-Traditional Global Roles for Actuaries Part 2: Corporate Roles October 19, 2022 9:30 AM - 10:45 AM

In the second part of a series to provide insights into alternative career tracks for actuaries in the global arena, a panel of actuaries who are working in house describe their current roles.

Session Category: International
Credits: CPD: 1.50

Speakers

- 1 . Mitsuyasu Nishiwaki WTW
- 2 . John Ashton Johnson & Johnson
- 3 . Robert Richard Maciejewski Jabil
- 4 . Erica Peters Apple



709 - The Macroeconomics of Aging October 19, 2022 9:30 AM - 10:45 AM

Populations are aging in most countries around the world. Analysts generally view this demographic trend as a cause for slowing economic growth and increased net savings, which combined to drive down the equilibrium level of interest rates. At some point, though, this demographic impact may shift as an increasing number of retirees spend down their accumulated assets. What are the implications for retirement funding? Increasingly mature pension plans, with greater reliance on trust fund returns, will need to address a continuously evolving array of capital market challenges.

Session Category: Investments
Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Elena V. Black The Terry Group
- 2 . Jerry Mingione The Terry Group
- 3 . Richard Jackson Global Aging Institute

005 - Humor That Works October 19, 2022 11:00 AM - 12:30 PM

83% of Americans are stressed out at work and 55% are unsatisfied with their jobs. The impact? Close to a trillion dollars in lost productivity and increased costs. Luckily humor is here to help. People who use humor are more productive, less stressed, and happier. This interactive and experiential program will teach you what humor at work means, why it is desperately needed, and how to use humor to create a positive work culture, increase team productivity, manage stress, and have more fun.

Session Category: Cross Discipline
Credits: CPD: 1.50

Speakers

- 1 . Andrew Tarvin