IABA 15th ANNUAL MEETING
Meeting New Challenges

August 1 – 2, 2008 • Westin Grand, Washington, DC
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Welcome to the 2008 Annual Meeting of the International Association of Black Actuaries (IABA).

This year has already proven historic with the nomination of an African-American for the presidency of the United States for the first time. All of human civilization is being challenged to find sustainable ways of feeding itself and meeting its energy needs. So this year’s theme, “Meeting New Challenges” is highly relevant.

Every American should visit the nation’s capital. With this in mind, I hope you will enjoy the bus tour of Washington DC, a first for this convention.

Our meeting is about professional development and networking with a dash of “official business”.

Be sure to take home at least five new business cards.

Thank you for your support,

John Robinson FSA, MAAA
Vice President, IABA
### 2007 – 2008 CORPORATE ADVISORY COUNCIL MEMBERS

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# IABA Committee Members - 2007/2008 Fiscal Year

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<tr>
<th>Annual Meeting Planning Committee</th>
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<tr>
<td>Damon Siler</td>
<td>Colin Alum</td>
<td>Clarissa Simpson</td>
<td>Pat R-Powell</td>
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<td>Michelle Thompson</td>
<td>Claudia Campbell ASA</td>
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<td>Victoria Appia</td>
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<td>Nana Prempeh</td>
<td>Zara D’Antignac FSA</td>
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<td>Clarissa Simpson</td>
<td>Nicole Harrington</td>
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<td>Troy Riddle</td>
<td>Les Jones ASA</td>
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<td>Suzanne Scott</td>
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<td>Christopher Reynolds</td>
<td>Donte Riddick</td>
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<td>Kezia Charles</td>
<td>Michelle Thompson ASA</td>
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<td>John Robinson</td>
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## Agenda at-a-Glance

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<tr>
<th>Time</th>
<th>Session</th>
<th>Topic</th>
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<tr>
<td>9:00 - 10:15</td>
<td>III</td>
<td>Professional Ethics</td>
<td>Tom Griffin</td>
<td>Use of Credit Scores in Ratemaking</td>
<td>Dr. Jesse Leary</td>
<td>Principles Based Reserving Update</td>
<td>Philip Barlow</td>
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<td>10:30 - 11:45</td>
<td>IV</td>
<td>Maximizing Shareholder Value</td>
<td>Keith Green</td>
<td>CAS Education Redesign</td>
<td>Roosevelt Mosley</td>
<td>Social Security Reform</td>
<td>Dick Schreitmueller</td>
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<td>12:00 - 2:00</td>
<td>Lunch</td>
<td>Health Care Reform</td>
<td>Sandi Hunt</td>
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<td>Health/International</td>
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<td>Pension</td>
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<td>Other</td>
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<td>Total</td>
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Continuing education credit hours for the 2008 International Black Actuaries Association (IABA) annual meeting have been determined as described in the American Academy of Actuaries’ standard: “Qualification Standards for Actuaries Issuing Statements of Actuarial Opinion in the United States: Effective January 1, 2008.”
FRIDAY, AUGUST 1

7:30 AM – 6:00 PM
Registration Open
Conference Level – Washington Ballroom Foyer

10:30 AM – 12:45 PM
Student Information Session with Lunch
Conference Level – DuPont

1:00 PM – 1:30 PM
General Session – Welcome
Conference Level – Washington Ballroom

CONCURRENT SESSIONS • 1:30 PM – 2:45 PM

1a Impact of Sub-Prime Mortgages on Investment Markets
Conference Level – Scott
Srinath Sampath, ASA, CFA
CE credit: 1.5 hours
The markets have been in turmoil since early 2007. What began in a small way as earnings restatements, ratings downgrades, and a tightening of underwriting standards quickly mushroomed into a full-fledged credit crisis with consequences in the real economy. This talk presents a review of the events of 2007–2008 and an outlook for the U.S. markets.

1b The Canadian Healthcare System
Conference Level – DuPont
co-presenter Douglas Andrews, FSA, FCIA
copresenter Linda Robinson-Eddin, MSC, BSc, PT
CE credit: 1.5 hours
Ten Questions Every Actuary Should Be Able To Answer Regarding The Canadian Health Care System:

1. What are the fundamental principles?
2. What is covered?
3. Who is covered?
4. How much does it cost?
5. Who pays for it?
6. How is the quality?
7. What about waiting lists?
8. What do Canadians think about it?
9. What do doctors think about it?
10. What’s its future?

In a thirty-minute presentation, Doug Andrews, a Canadian actuary, will answer these questions regarding the Canadian health care system. In the question and answer session, he’ll answer any other questions you have regarding Canadian health care.

1c General Ratemaking
Lobby Level – Mayfair Court
Russell Greig, FCAS, MAAA, CFA
CE credit: 1.5 hours
The presentation will cover the basic actuarial methods and judgmental considerations underlying the projections of overall rate level changes and classification rates for property and casualty coverages. It will also include discussion of some line of business specific terminology and current ratemaking issues.

2:45 PM – 3:00 PM
BREAK

CONCURRENT SESSIONS • 3:00 PM – 4:15 PM

IIa Trends in Employee Benefits
Conference Level – Scott
Lee Bethel, CLU, ChFC, RHU, REB
Member, Society of Financial Service Professionals
Presentation made possible through IABA’s relationship with the Society
Come learn what you need to know about the different types of Employee Benefit Programs that are available today and how they can benefit you and your clients. This session will give you an overall understanding of the basics of Employee Benefit and Retirement Programs and how they are used today.

IIb Variable Annuities: Global Market Trends
Conference Level – DuPont
Noel Harewood, FSA, MAAA
CE credit: 1.5 hours

IIc Retirement Income Solutions: Recent Developments around the Globe
Lobby Level – Mayfair Court
Simpa Baiye FSA, MAAA
CE credit: 1.5 hours
The market for individual retirement income solutions has grown steadily over the past few years, as providers of income products have responded to the emerging needs of the “baby boomer” generation. This session will provide an update on emerging and prevalent products in the market place, as well as an overview of the unique challenges faced by insurance companies in the marketplace for individual retirement income solutions.

6:00 PM – 9:00 PM
Welcome Reception
Sponsored by MetLife
Lobby Level – Promenade/Courtyard

9:00 PM – 11:00 PM
Bus Tour
SATURDAY, AUGUST 2

7:30 AM – 5:00 PM
Registration Open
Conference Level – Washington Ballroom Foyer

8:00 AM – 9:00 AM
Breakfast
Conference Level – Washington Ballroom Foyer

CONCURRENT SESSIONS • 9:00 AM – 10:15 AM

IIIa Professional Ethics
Conference Level - DuPont
Tom Griffin, Esq.
CE credit: 1.5 hours
The Professionalism Session will be an interactive discussion of some of the important aspects of, and problem areas in, professionalism.

IIIb Use of Credit Scores in Ratemaking
Conference Level - Scott
Jesse Leary, Ph.D.
CE credit: 1.5 hours
The 2003 Fair and Accurate Credit Transactions Act, or “FACTA,” required federal agencies to conduct a study of the effects of credit scores and credit-based insurance scores on the price and availability of credit and property and casualty insurance to consumers. The mandate also included an analysis of whether scores have unfair or disproportionate impacts on minority, low income consumers, and other protected classes of consumers. In July 2007 the FTC released a report on the impacts of credit-based insurance scores on consumers of automobile insurance. Dr. Jesse Leary, an FTC economist and one of the authors of the report, will present the results of that study and describe on-going efforts to conduct a study of credit-based insurance scores and homeowners insurance.

IIIc Principles Based Reserving Update
Lobby Level – Mayfair Court
Philip Barlow, FSA, MAAA
CE credit: 1.5 hours
The session will discuss the Principle-based Approach (“PBA”) to calculating life insurance reserves and capital for US insurance companies. Topics covered will include an overview of the purpose and goals of PBA, key elements of the PBA framework, a regulatory perspective on PBA and some tax and implementation issues.

10:15 AM – 10:30 AM
Break

CONCURRENT SESSIONS • 10:30 AM – 11:45 AM

IVa Maximizing Shareholder Value
Conference Level - DuPont
Keith Green, MA, MBA
CE credit: 1.5 hours
This session will examine the key determinants of shareholder value creation in the Property & Casualty industry. Specifically, we will analyze the correlations between financial performance and price performance, and between financial performance and relative valuation.

IVb CAS Education Redesign
Conference Level - Scott
Roosevelt Mosley, FCAS, MAAA
CE credit: 0 hours
In early 2008 the CAS Board of Directors approved changes to the CAS basic education structure that will affect current CAS Exams 5 – 9. Implementation of these changes will begin no sooner than 2011. This session will discuss these changes in more depth.

IVc Social Security Reform
Lobby Level – Mayfair Court
Dick Shreitmueller, FSA, MAAA
CE credit: 1.5 hours
This session will discuss possible changes to the U.S. Social Security program of retirement, disability and survivors benefits.
- Current program structure
- Financing problems
- Current proposals
- Possible future proposals

12:00 PM – 2:00 PM
Luncheon with Speaker
Health Care Reform
Lobby Level – Promenade/Courtyard
Sandi Hunt, MPA
CE credit: 1 hour
Health insurance reform is a hot topic at both the state and national level, with both presumed presidential candidates presenting varying views of the solution to insuring more people. States are exploring options on their own, including Massachusetts, which implemented universal health insurance reform, California, which has been working for more than 20 years to expand insurance coverage, and many other states. Actuaries play a key role in helping policy makers understand the likely outcomes of legislative and regulatory options. Ms. Hunt will provide an overview of her experience working with states around the country on their insurance reform efforts, the key issues that are addressed, and the policy debates that typically ensue. She will also provide a high level overview of the results that have been observed to date. She’ll draw on her experience in California, Oregon, Wisconsin, Hawaii, Massachusetts, Kentucky, and many other states.

2:00 PM – 2:15 PM
Break

2:15 PM – 4:00 PM
General Session
Conference Level – Washington Ballroom

6:00 PM – 9:30 PM
Awards Banquet
Sponsored by ING
Conference Level – Washington Ballroom
Keynote Speaker: Frederick Kilborne

9:30 PM – 11:30 PM
Afterglow
Lobby Level – Promenade/Courtyard
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*A Passion

I want to wake up every morning excited about going to work. I want to

influence others. I want to motivate and inspire employees, with
great motivation. I want people to care about budgets, employee turnover,
and pension. I want to fall in love with my career.
Doug Barlow is associate commissioner for Insurance with the District of Columbia Department of Insurance, Securities and Banking (“Department”). Mr. Barlow has been with the Department for 8 years and is responsible for overseeing the operations of the Insurance Bureau. He is also a member of the Executive Leadership Council.

Prior to joining Allstate, Mr. Green worked as an investment banker at Deutsche Bank and Goldman Sachs in New York and London, and as a management consultant with McKinsey & Company in New York, Paris and Houston.

He received a B.A. from Tulane University, an M.A. from Middlebury College, and an M.B.A. from Harvard Business School. He also attended Oxford University as a Rhodes Scholar. Mr. Green serves on the Board of Trustees of the Goodman Theatre, where he co-chairs the Corporate Committee; United Cerebral Palsy, where he chairs the Affiliate Services Committee; and the Latin School of Chicago. He is also a member of the Executive Leadership Council.

Russell H. Greig, FCAS, MAAA, CFA

Mr. Greig is a senior consulting actuary with the Tillinghast business of Towers Perrin in the firm’s Atlanta office. He is a principal of Towers Perrin. Since joining the firm in 1999, Mr. Greig has performed analysis of reserves and funding requirements primarily for the workers’ compensation, medical malpractice, auto liability, general liability and products liability lines of business. Mr. Greig has also performed various financial analyses on behalf of insurance companies and self-insured entities. His clients include insurance companies, workers’ compensation state funds, workers’ compensation rating bureaus and self-insured entities.

His prior experience included pricing, reserving and ratemaking research for workers’ compensation insurance at the National Council on Compensation Insurance. His pricing experience included work on F-classes, Maritime classes,
SPEAKERS

Coal Mine classes, and retrospective rating. His reserving experience included work on the residual market pool. Mr. Greig also has expertise in retrospective rating factors, class rating research and modeling loss distributions.

Mr. Greig is a Fellow of the Casualty Actuarial Society (“CAS”) and a Member of the American Academy of Actuaries and a Chartered Financial Analyst. He has a Bachelor of Science, with honors, in actuarial science from Florida A & M University.

He is a past vice president of college relations for the Casualty Actuaries of the Southeast and previously served the CAS Examination Committee and on the CAS Committee on Minority Recruiting. He has authored and co-authored several articles on workers’ compensation, credibility theory and predictive modeling. He also made presentations at industry conferences and internal insurance company conferences.

Thomas C. Griffin, Esq.

Tom Griffin has worked as a staff attorney at the American Academy of Actuaries since June 1994. He advises, and facilitates the work of, the Actuarial Board for Counseling and Discipline (“ABCD”). Established through the Academy’s bylaws, the ABCD serves the profession as a whole. It provides guidance to actuaries with ethical questions, and it investigates apparent violations of the Code of Professional Conduct. Throughout his Academy tenure, Tom has participated in professionalism presentations at meetings of actuarial societies and actuarial clubs.

Prior to joining the Academy staff, Tom served 20 years in the U.S. Army, 17 years as an army lawyer. For approximately five of those years, he either prosecuted or defended criminal cases, serving one year as a Special Assistant U.S. Attorney in the U.S. Magistrate’s Court in Augusta/Fort Gordon, Georgia, prosecuting on-base offenses. After trial work, Tom’s legal career in the army focused on administrative law issues, such as federal employee standards of ethical conduct, investigations, due process, and military personnel law.

Tom received his B.A. in Political Science from Oberlin College, his J.D. from the University of Tennessee College of Law, and an LL.M. (Master of Laws) - equivalent in Military Law from the Army Judge Advocate General’s School in Charlottesville, Virginia. He is a member of the American Bar Association, the South Carolina Bar, the District of Columbia Bar, and ASAE & the Center for Association Leadership.

Noel Harewood, FSA, MAAA

Noel Harewood is a Senior Consultant with the Tillinghast business of Towers Perrin. Mr. Harewood joined the firm in 1999 and practices in the financial services sector.

Mr. Harewood’s primary areas of practice are financial modeling of life insurance and annuity products. He has significant experience in working with variable annuity products in various contexts.

His recent projects include:

- assisting a large European insurer in the development of a potential variable annuity offering in the U.K.
- assisting a large North American insurer in the development of a variable annuity offering in Canada
- assisting a large European insurer in an evaluation of the US life insurance market, including actuarial due diligence on a potential target and assistance in evaluating the potential impact of the merger on IFRS earnings
- assisting a large North American insurer in the evaluation of strategic alternatives for a large block of variable annuity business
- assisting a large North American insurer in modeling a block of assumed variable annuity business for embedded value reporting
- performing embedded value reviews for the North American subsidiaries of multinational insurers and reinsurers, including values compliant with European Embedded Value principles.

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Mr. Harewood graduated from The University of Nebraska–Lincoln with a B.S.B.A. (highest distinction) in actuarial science. He is a member of the American Academy of Actuaries’ Life Financial Reporting Committee, and has been a speaker at several actuarial meetings. He is a Fellow of the Society of Actuaries and a Member of the American Academy of Actuaries.

**Sandi Hunt, MPA**

Sandi Hunt is a partner in the San Francisco office of PricewaterhouseCoopers. She specializes in government health policy and insurance reform and works with states across the country on their efforts to expand health insurance coverage. Sandi has extensive experience with public programs as well as with the health care industry and holds a master’s degree in Public Administration with an emphasis in Public Policy Analysis. She heads PwC’s Government Healthcare Consulting practice and has served as the Engagement Partner on numerous complex engagements, including the Oregon Health Plan, TennCare, and California’s insurance reform initiatives. In addition, she is currently the engagement partner for PwC’s work for the Kentucky Medicaid program, the Wisconsin Medicaid program, the Virginia Medicaid program, California Managed Risk Medical Insurance Program, and various other clients. She has been responsible for developing innovative methods for pricing health care programs and developing negotiating strategies. She has also had responsibility for developing regulations and working through the federal waiver application process.

Ms. Hunt has been with PwC since 1986; prior to that time she worked for three years performing health economics research related to competition in health care markets at the Institute for Health Policy Studies, University of California, San Francisco.

Ms. Hunt received her B.A. from Washington State University in 1982 and her M.P.A. in public policy analysis form the University of Washington in 1986.

**Frederick Kilbourne**

Fred Kilbourne has been a consulting actuary for 45 years. He started the casualty actuarial practice of Milliman; an actuarial division for Booz, Allen; and the insurance actuarial practice of Mercer. With his partner, Kathy Blum, he started independent actuarial practices named Future Cost Analysts, in 1981, and The Kilbourne Company, in 1991.

Fred is a Charter Member of the American Academy of Actuaries and a Founding Member of the National Academy of Social Insurance. He is a Fellow of the Canadian Institute of Actuaries, the Casualty Actuarial Society, the Conference of Consulting Actuaries, and the Society of Actuaries; and was President of the CAS and of the Conference. He is a Member of the American Society of Pension Actuaries and is an Enrolled Actuary.

Fred has been actively involved with the actuarial profession for many years. He has made nearly a hundred panel or other presentations at meetings of a dozen actuarial organizations. He has had a dozen articles published in Contingencies, including one in 2008 on the cost of government. He has been a member of scores of actuarial committees, and was for six years a member of the Actuarial Standards Board. He was Chairman of the Task Force charged with the Critical Review of the US Actuarial Profession (CRUSAP), and was the 2007 recipient of the Academy’s Jarvis Farley Award.

Fred’s consulting practice has covered all lines of actuarial specialties, with an emphasis on casualty actuarial assignments. He has been consulting actuary for over 30 years to the California Hospital Association, the California State Employees Association, and Vision Service Plan. The Ford Foundation funded his projects concerning prepaid legal services and no-fault auto insurance. He was subcontractor to Stanford Research Institute for a major study of risk classification for the Insurance Services Office. He has been retained by plaintiffs or defendants nearly one hundred times as an expert witness, including a dozen times by the Internal Revenue Service. He is currently actuary to the Public Members of the Governing Committee of the Workers’ Compensation Insurance Rating Bureau of California. Other clients have included General Motors, the National Football League, and the University of California.

Fred lives and works in San Diego with his wife, Kathy, and their teenage daughter, April. He has two grown daughters, Laura and Wendy, and three grandchildren.

**Jesse Leary, Ph.D.**

Jesse Leary is the assistant director for Consumer Protection in the FTC’s Bureau of Economics. He has worked on range of investigations and enforcement actions involving allegations of discrimination in mortgage lending or deceptive lending (“predatory lending”), and was the lead researcher on the FTC’s study of credit-based insurance scoring. In his current role, he supervises the FTC economists that work on all aspects of the Commission’s consumer protection mission, including the consumer credit and mortgage lending areas, privacy, false advertising, and fraud.

Dr. Leary joined the FTC as a staff economist in 1999 after receiving his Ph.D. from Cornell University.

**Roosevelt Mosley, FCAS, MAAA**

Roosevelt Mosley is a Principal and Consultant with Pinnacle Actuarial Resources, Inc. in the Bloomington, Illinois, office. He has extensive experience in the application of advanced statistical modeling techniques to insurance processes. His experience in predictive modeling applications includes rating and underwriting plan design, homeowners by-peril analysis, claims modeling, developing custom credit based insurance scores; developing enhanced vehicle classification development; territory boundary development, policyholder retention analysis, and new business conversion analysis. He also has experience in the areas of personal lines ratemaking, including California auto sequential analysis filings and profitability analysis for private passenger automobile and homeowners insurance; underwriting and tiering plan design and evaluation; evaluation of insurance scores for incorporation to rating and/or underwriting; insurance legislation pricing and analysis, including no-fault auto insurance pricing; evaluation of books of business for acquisition; rate filing and regulatory compliance; competitive analysis; reserving; catastrophe modeling, litigation support and financial modeling.

Before joining Pinnacle, Roosevelt was employed as a pricing actuary for State Farm Mutual Automobile Insurance Company, and by Vista Insurance Group, where he was the personal lines manager responsible for homeowner and private passenger automobile ratemaking and products. Roosevelt holds a Bachelor of Science degree in Actuarial Science and a Bachelor of Science degree in Statistics from the University of Michigan in Ann Arbor. He is a Fellow of the Casualty Actuarial Society and a member of the American Academy of Actuaries. He currently serves the CAS as a member of the Board of Directors and the Strategic Planning Committee. He has previously served the CAS as a member of the Committee on Professionalism Education, a member of the Joint CAS/SOA Committee on Minority Recruiting, and a participant in the CAS University Liaison program. He also serves as Vice President on the International Association of Black Actuaries Foundation.

**Linda Robinson-Edwin**

Linda Robinson-Edwin is the owner/operator of LJR Physiotherapy Services Inc., a provider of broad-based and innovative physiotherapy programs in the Brampton community of Southern Ontario. Her main focus is the development of a multidisciplinary rehabilitation clinic that provides coordinated rehabilitation services to motor vehicle injured clients, injured workers and the private outpatient orthopedic population. She is also an Independent Physiotherapy Evaluator providing her services through ACTIVE Health Management, a national network of Independent Health Care Providers throughout Canada.

Ms. Robinson-Edwin spent her early years as a physiotherapist working within the Jamaican hospital system. Her practice of physiotherapy was expanded when she moved to Alberta, Canada to pursue academic work in the field of Physiotherapy. Over the past several years, Ms. Robinson-Edwin has worked within the Canadian Health care system in a variety of out-patient settings, both private and hospital based. Highlights of her career have included roles in the clinical, academic and political life of her profession. She was the Senior Physiotherapist involved in the first Community-based Sports Injury Clinic – an OHIP funded initiative of the Peel Memorial Hospital in 1987. Her recent experiences in the Private sector have provided a close up view of the changes occurring within the Canadian health care system.
Ms. Robinson-Edwin received her Diploma in Physical Therapy from the Jamaica School of Physical Therapy in 1978 and her BSc and MSc degrees from the University of Alberta in 1983 and 1987. She is currently licensed as a Physiotherapy practitioner with the College of Physiotherapists of Ontario and is a member in good standing of the Canadian Physiotherapy Association.

Srinath Sampath, ASA, CFA
Srinath Sampath is a senior investment professional and portfolio manager at Nationwide Investments. He trades structured product (asset-backed securities, mortgage-backed securities and collateralized mortgage obligations) and rates (treasuries, agencies, and treasury inflation-protection securities) for the general account. He is also a member of the investment team that manages the Nationwide government bond mutual funds.

Prior to joining the asset management group in 2002, Mr. Sampath was a quantitative analyst in the portfolio risk management group where he worked on credit research and performance measurement. Before joining Nationwide Investments in 2000, Mr. Sampath was an actuarial analyst in Nationwide Pension Product Actuarial where he was involved in product development and pricing for the Nationwide Trust Company.

Mr. Sampath received his B.Sc. in Statistics from Loyola College, Chennai, India in 1992 and his M.S. in Statistics from The Ohio State University, Columbus, Ohio in 1994. He is an Associate of the Society of Actuaries and a Chartered Financial Analyst.

Dick Schreitmueller, FSA, MAAA
Richard G. Schreitmueller is a freelance adviser and writer based in the Washington DC area. Building on a varied career as an employee benefit consultant, Dick helps nonprofit organizations create and publish information on retirement planning and financial security, including the Women’s Institute for a Secure Retirement (WISER), AARP and the Society of Actuaries.

Mr. Schreitmueller has held positions as Director of Group Pension Planning for Aetna Life Insurance Company, consulting actuary for Watson Wyatt, William M. Mercer and Aon Consulting, and actuary for the Social Security Administration and the U.S. Senate Committee on Governmental Affairs. As a Senate staffer he created the index fund structure used in the highly successful federal employees’ Thrift Savings Plan, which some observers now wish Social Security to use for investing trust funds in the stock market. Dick has written about Social Security reform for Contingencies magazine and the American Academy of Actuaries Committee on Social Insurance.

Dick has a BSEE (sum laude) from the University of Notre Dame and has taught graduate courses in pensions at the University of Connecticut and Loyola University (Baltimore). He is a Fellow of the Society of Actuaries, Member of the American Academy of Actuaries and Fellow of the Employee Benefit Research Institute. Dick has served on the Board of Governors of the Society of Actuaries and on many professional committees, task forces and lobbying groups, and has published numerous papers and articles on pensions and Social Security. He is past president of the Middle Atlantic Actuarial Club and served a 15-year term as a presidential appointee to the Military Retirement System’s Board of Actuaries.
Aetna is proud to support the International Association of Black Actuaries 2008 Annual Meeting.

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