

SAM SMITH

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ACTUARY/PENSION CONSULTANT WITH 20+ YEARS OF INDUSTRY EXPERIENCE

Actuarial Systems Development & Improvement/Client Consultation & Support/Plan Design & Compliance

EXECUTIVE SUMMARY

A dynamic, results-driven, and employee-focused Actuary with 20+ years of increasing responsibilities, quantifiable achievements and diverse experience working with various private sector firms and government agencies. Forward-thinking leader and enterprising problem-solver with keen bottom-line focus. Proven ability to build strong relationships and develop and implement strategies that lead project teams to success. A skilled communicator, motivator, and facilitator with superior interpersonal, analytical, and assessment skills. Willing to travel.

CORE COMPETENCIES

- *Plan Design & Compliance*
- *Valuation Supervision*
- *Customer Operations/Support*
- *Nondiscrimination Testing*
- *Studies/Projections*
- *Client Presentations/Briefings*
- *Project/Team Management*
- *Group Collaboration/Facilitation*
- *Staffing/Scheduling/Delivery*
- *Schedule Certification/Validity*
- *Benchmark Analysis/Reporting*
- *Proposal Evaluation/Comparison*
- *Policy & Procedure Development*
- *Program Design/Implementation*
- *Software Design/Maintenance*
- *Calculation Integration*
- *Process & System Restructuring*
- *Instructional Design & Delivery*

DESIGNATIONS

- Associate, Society of Actuaries (ASA) • Enrolled Actuary (EA) • Fellow, Conference of Consulting Actuaries (FCA)

EDUCATION

Master of Arts in Physics - City University of New York, New York City, New York

Bachelor of Science in Physics - The Cooper Union School of Engineering and Science, New York City, New York

MILITARY SERVICE

- Specialist 4, 7th Special Forces Group (Airborne), United States Army - Honorably Discharged

PROFESSIONAL EXPERIENCE

Actuary - ABC Company

Any Town, USA

Dec. 2010 - Mar. 2011

Hired along with a Systems Partner from the ABC Corporation (ACCC) engagement for a period of three+ months by this independent employee benefits firm providing a variety of Actuarial, Health & Welfare, and Investment consulting services for corporate, public sector, multi-employer plans, and not-for-profit organizations.

- Reviewed software to calculate annuity values under PPA.
- Reviewed software to calculate multiemployer amortization and asset relief under PRA 2010.

Project Lead/Actuarial Consultant at ABC Company, Any Town, USA

Jun. 1991 - Nov. 2010

Spearheaded teams of up to twelve (12) that developed, enhanced, maintained, and supported use of the ABCC's Integrated Present Value of Future Benefits (IPVFB) system and the ABCC's Pension Insurance Modeling System (PIMS) for two firms, ABC Incorporated and ABC Worldwide.

- Maintained direct accountability for the design, implementation, staffing, schedule attainment, and delivery of both systems with primary responsibility for the integrity of the calculations.

Project Lead/Actuarial Consultant at ABC Company (Jul. 2003 - Nov. 2010)

Selected Accomplishments:

- Led the successful effort to again win five year renewals of both engagements, IPVFB in September 2009, and PIMS in March 2010.
- Developed, in collaboration with my team, Multiemployer PIMS; first used to provide exposure footnotes to the ABCC's Annual Report, September 2009.
- Assisted ABCC in conversion of a 1M participant Oracle database; identified several duplicate payments and assisted in implementing controls to prevent future issues, January 2007 - July 2007.
- Led the consulting team that assisted ABCC to evaluate and compare numerous administration and legislative pension reform proposals which led to the passage of PPA; this high visibility work consisted of a series of exceedingly rapid turnaround changes to the funding rules in ABCC's Pension Insurance Modeling System, January 2004 - August 2006.

PROFESSIONAL EXPERIENCE (CONTINUED)

- Led the successful effort to win five year renewals of both engagements, September 2004.
- Brought both ABCC engagements and the core engagement team from ABC Incorporated to ABC Worldwide (with the approval of both ABCC and ABC Incorporated because of Government Accounting Standard 3).

Director - ABC Company (Jun. 1991 - Jun. 2003)

- Spearheaded the successful effort to win The Pension Insurance Modeling System engagement award, a significant expansion of the overall engagement, March 2002.
- Led the successful effort to win renewals of the IPVFB engagement, October 1995 and October 2000.
- Reduced the time required to prepare the ABCC's annual actuarial report by 75%, 1996.
- Led the development of Integrated Present Value of Future Benefits (IPVFB) system; The system integrated data preparation, allowed valuation of cases by one of three methods (seriatim, non-seriatim, or cash flow methodology), and included numerous results databases as well as extensive reporting and controls, 1996.
- Promoted from Senior Consultant to Director, March 1993.
- Instrumental in the ABCC acquiring and subsequently maintaining a favorable audit opinion from GAO, 1992.

Senior Consultant - ABC Company (Jun. 1986 - Jun. 1991)

- Developed The Pension Valuation Automated System (PVAS), a menu driven valuation system that reduced valuation setup time; significantly enhanced the firm's competitiveness and profitability, 1987.
- Created custom software to support the comprehensive joint C&L/Financial Executives Research Foundation Field Test of the Financial Accounting Standards Board (FASB) exposure draft 106 on Accounting for Postemployment Medical Benefits, 1988.
- Produced The ABC© system to account for post-retirement medical and other group benefits and
- The Benefit Certification Module of ABC©, ABC Incorporated's pension administration system, 1990.

Vice President, Actuary - ABC Company, Any Town, USA (Jun. 1983 - Jun. 1986)

- VP in charge of data processing group. Oversaw of purchase of and conversion to new computer.
- Actuarial Consulting (Valuations, Studies, Nondiscrimination testing, client presentations) for qualified and non-qualified plans of such diverse firms as Boca Raton Community Hospital, British Airways, Burmah Oil, Germaine Monteil Cosmetiques Corp. (a British American Tobacco Company), the New York Giants football team, Phillips Van Heusen, Republic Steel Company and Weis Markets.

PROFESSIONAL DEVELOPMENT/SPECIALIZED TRAINING

- Compliant on Continuing Actuarial Education
- Facilitated Sessions on Social Security and Qualified Plan Integration at Enrolled Actuary Meetings

TECHNICAL ADDENDUM/SOFTWARE KNOWLEDGE

FORTRAN, C++, SAS, SQL, Excel

AFFILIATIONS

- Member, American Academy of Actuaries (MAAA)

References Furnished Upon Request