

Conference of

# The Consulting Actuary

Consulting Actuaries

## Message from the President



Last month, I reported to you about our annual Strategic Planning meeting. What I didn't discuss was our member and customer survey that many of you took the time to complete last fall. That survey was important to us as we worked in that meeting toward developing and refining our strategic initiatives for 2018 and beyond. We paid attention to what you said. And, we used all the feedback that we got from the survey to guide us in finding ways to increase the value that you, our members, will be receiving from the CCA. Look for some exciting announcements in the months to come. I know what we are working on and when we roll out these initiatives, there will be no doubt in your mind that the CCA is the actuarial organization whose value to you truly exceeds your dues.

Pension and health actuaries have CCA-sponsored meetings coming up in April, both at the Marriott Wardman Park Hotel in Washington DC. The EA Meeting kicks off on Monday, April 9 and the Healthcare Meeting on Wednesday, April 11. In addition, the CCA Professionalism Seminar will be held on Sunday, April 8. These are sure to be wonderful events and don't forget that when you take a break from the meetings, it is likely to be cherry blossom time in our nation's capital.

I will be in town for those meetings and I'd like to meet you. I'll be hosting a number of opportunities to "meet the President," and while I'd love to shake your hand and put a face to a name, I'd really like more than that. I want you to tell me what we are doing well, but more so, I'd like to hear what we can do better. I'd like your suggestions. As the meetings approach, you'll notice that we are setting up "Communities" for each meeting on the CCA Community website. On those Communities, we'll give you more details about where and when I'll be meeting our members.

Returning for a moment to our survey results, one of the interesting, but not surprising to me, things that we learned is that our members who volunteer for the CCA, whether that's in an extensive role or just very occasionally, report that they get more from their CCA membership. They are our most engaged members and they are our most satisfied members. From a personal standpoint, I can tell you that there is no doubt in my mind that it's true - for them, for me, and it could be for you. So, I implore you to get involved. It's your organization. Volunteer to be a speaker of a session assistant. Join a committee or task force. Participate in an online community.

If you don't know how or don't know what's available, contact the CCA office at 847-719-6500 or [conference@ccactuaries.org](mailto:conference@ccactuaries.org) or contact me directly at 770-235-8566 or [jlowell@octoberthree.com](mailto:jlowell@octoberthree.com).

I look forward to hearing from you and I look forward to meeting many of you next month in DC.



John H. Lowell, FCA, ASA, EA, MAAA  
President

## Membership News

### CCA Community to Hold Conference Call



On Wednesday, **March 21**, 2018 at 11:30 AM CT, the Corporate Qualified Pensions Community will be hosting a call in follow up to the CCA Webcast - ASOP 51: Assessing and Disclosing Pension Risk.

All CCA Members are welcome to join the call. To participate, dial 866-862-7809 and enter the passcode 4478414.

Interested in joining a Community? Visit [www.ccactuaries.org](http://www.ccactuaries.org).

### Submit Your Nominations for CCA Awards

The deadline for nominations for CCA Awards is fast approaching. Why not take a moment and acknowledge a colleague by nominating them for a CCA Award?

The **Most Valuable Volunteer Award** is awarded to a volunteer for contributions made to the CCA or the actuarial consulting profession during the past 12 to 24 months. All CCA Members, except current members of the Board of Directors, are eligible for the award. To submit a nomination for the Most Valuable Volunteer Award, complete the [Most Valuable Volunteer Award Form](#).

The **Lifetime Achievement Award** is awarded to a volunteer for contributions made to the CCA or the actuarial consulting profession during his/her professional career. All CCA members are eligible and Past Presidents of the CCA become eligible five years after serving as President. To submit a nomination for the Lifetime Achievement Award, complete the [Lifetime Achievement Award](#).

Awards will be presented at the 2018 Annual Meeting at the Broadmoor in Colorado Springs, CO.

The nomination deadline is **June 1, 2018**, so get your nomination in today!

## Actuarial News



### IAA Exposure Draft Open for Comment

The IAA has provided the exposure draft of the proposed revision to International Standard of Actuarial Practice 4 (ISAP 1) on IFRS 17 Insurance Contracts and the related amendments to the glossary. The documents are available on the IAA website under Publications, and can be viewed by clicking on the following link:

[http://www.actuaries.org/index.cfm?lang=EN&DSP=PUBLICATIONS&ACT=STANDARDS\\_ISAPIFRS](http://www.actuaries.org/index.cfm?lang=EN&DSP=PUBLICATIONS&ACT=STANDARDS_ISAPIFRS)

The deadline for comments on this exposure draft is 30 June 2018.

### Guidelines on Building a Successful Actuarial Practice

CCA Board member Rich Bailey has authored a paper titled "[Successful Actuarial Practice in a Consulting Organization](#)." The paper details 10 guidelines to building a successful actuarial practice in a consulting firm that enables efficient delivery of financial work. The CCA welcomes other opinions and thoughts on the subject, and encourages members to [join our communities](#) which promote sound actuarial considerations throughout the profession.

Watch for details of an upcoming Community conference call to discuss the paper. All CCA member are invited to attend.

*The comments contained in this paper do not necessarily reflect the views of the CCA, the CCA's members, or any employers of CCA*

members, and should not be construed in any way as being endorsed by any of the aforementioned parties.

## **IRS/Treasury and PBGC Intersector Meeting Notes**

The notes from the October 11, 2017 Intersector Meetings between representatives of various actuarial organizations and representatives of IRS/Treasury and PBGC been posted to [www.cactuaries.org](http://www.cactuaries.org) as information. You may access through the following links:

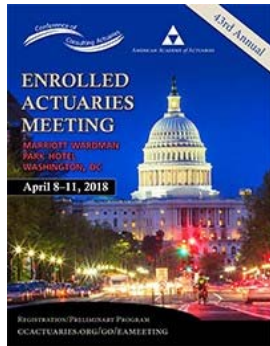
[Notes from Intersector Meeting with IRS/Treasury](#)

[Notes from Intersector Meeting with PBGC](#)

## **Education Spotlight**

### **Space Still Available for Upcoming Meetings**

Forgot to register? There are still a few spots available for the upcoming the CCA Healthcare Meeting, Professionalism Seminar and Enrolled Actuaries Meeting. Register now to secure your place at these events.



### **Professionalism Seminar**

April 8, 2018  
Marriott Wardman Park Hotel  
Washington, DC

This seminar is a great opportunity to discuss and explore managing professional liability and reputational risk with a group of your peers and experts in the field. Don't miss out on this thought-provoking session.

[Register Now!](#)

### **2018 Enrolled Actuaries Meeting**

April 8-11, 2018  
Marriott Wardman Park Hotel  
Washington, DC

The 43rd annual Enrolled Actuaries Meeting offers a variety of panels and workshops, covering a wide range of topics and issues relevant to Enrolled Actuaries and other pension professionals. This year's program features a revised schedule with more sessions and gain more credit and offers a general session for 2.0 EA Ethics credit. Be sure to [Register Today!](#)

### **CCA Healthcare Meeting**

April 11-12, 2018  
Marriott Wardman Park Hotel  
Washington, DC

The CCA Healthcare Meeting provides health actuaries and other healthcare professionals the chance to hear the latest developments on the Affordable Care Act and to discuss with peers what's happening on the home front of healthcare reform. The meeting features a variety of sessions on healthcare issues, providing relevant education for healthcare providers, carriers and employers. This year's meeting will also feature sessions on the Opioid Epidemic. [Register now!](#)

### **Seminar on Executive Presence Coming to Chicago**

Building Your Brand: Executive Presence as a Consulting Actuary  
May 21, 2018 Chicago, IL

As a presenter, how can you consistently project poise and confidence? Strong presentation skills are essential for successful professionals, whether they present from the front of the room, the head of the table, on a video conference, or as part of a team for a "town hall" meeting. Calm, confident, and credible presenters adapt to the environment and form an immediate and lasting impression with their audience.

The Conference of Consulting Actuaries (CCA) has teamed up with Exec Comm and developed an Executive Presence program, specifically designed for consulting actuaries. This course helps you successfully manage your presence, information, and audiences so your confidence and credibility remain strong. In your half-day seminar, you will acquire skills through video recording, group exercises, and instructor coaching. Don't miss this limited opportunity to hone your executive presence.

For more information or to register, visit [www.ccaactuaries.org](http://www.ccaactuaries.org).

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## **Upcoming Events**

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April 8, 2018 - Washington, DC  
[Professionalism Seminar - Managing Professional Liability and Reputational Risk](#)

April 8-11, 2018 - Washington, DC  
[Enrolled Actuaries Meeting](#)

April 11, 2018 - Washington, DC  
[CCA Healthcare Meeting](#)

May 9, 2018

[Lifetime Retirement Income Webinar](#)

May 21, 2018 - Chicago, IL

[Building Your Brand: Executive Presence as a Consulting Actuary](#)

June 13, 2018

[Multiemployer Issues Affecting Us All Webinar](#)

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