Speaker Biographies

Heather Abrigo, APM
Drinker, Biddle & Reath
Los Angeles, CA

Heather B. Abrigo has extensive experience in all aspects of employee benefits and especially in working alongside plan committees to fulfill their fiduciary duties. Her clients come to her for assistance with qualified and non-qualified retirement plans as well as health and welfare issues. Heather assists public sector employers with navigating their retirement plan issues as well as their retiree health plans. She assists with Department of Labor investigations and Internal Revenue Service audits. Her services include but are not limited to assisting plan sponsors in meeting their fiduciary responsibilities, reporting and disclosure matters, and drafting qualified, non-qualified and welfare benefit plan documents. Heather assists various service providers in the financial services sector with their service agreements and complying with disclosure requirements under ERISA and the Securities and Exchange Commission. Heather co-authored the 14th Edition of "Tools & Techniques of Employee Benefits and Retirement Planning" published by the National Underwriter Company. She is also a regular contributor to the 401(k) Advisor publication.

Angela Barclay, MSPA
Pension Benefits Unlimited, Inc.
Irvine, CA

Angie is an Enrolled Actuary at Pension Benefits Unlimited, Inc. A graduate of Cornell University, Angie double majored in Mathematics and Economics before earning her Master's Degree in Education. Angie has 10 years of experience with pension and actuarial consulting and administration. Angie currently serves on the ACOPA Leadership Council and also volunteers for the ACOPA Retirement Plan Academy Advisory Group, the ACOPA Membership Committee, and the Conference Committee for ASPPA Annual. In addition, Angie has previously served on the Society of Actuaries Exam Writing Committee and the LA Advanced Pension and 401(k) Conference Committee.

Avaneesh Bhagat
Internal Revenue Service
El Monte, CA

Avaneesh is the manager of EP Voluntary Compliance Group at the Internal Revenue Service. Avaneesh has worked with the examination, determination letter and voluntary compliance functions of the IRS' Employee Plans Division since 1988.

Richard A. Block, FSPA
Block Consulting Actuaries, Inc.
El Segundo, CA

Rick is a Fellow of the ASPPA College of Pension Actuaries, a Fellow of the Conference of Consulting Actuaries, a Member of the American Academy of Actuaries, an Associate of the Society of Actuaries and an Enrolled Actuary. Rick served as a Director for the American Society of Pension Actuaries and has served on the ASPPA Standards Committee, the Professional Conduct Committee and the Actuarial Issues Committee. Rick has also served on the American Academy of Actuaries Committee on Professional Responsibility and on the Council of Presidents Task Force on Professional Standards. Rick currently serves on the ACOPA Government Affairs Committee. Rick was a co-founder of the College of Pension Actuaries (COPA) and served as its president, 2007-2008. During his presidency, Rick helped negotiate the merger of COPA with ASPPA which created ACOPA. Rick served on the Actuarial Board for Counseling and Discipline (ABCD) for six years and retired as chairperson on December 31, 2018. In 2013, Rick was awarded ACOPA's Edward E. Burrows Distinguished Achievement Award. For relaxation, Rick has been known to compete successfully in amateur automobile racing.
Speaker Biographies

**Gary Bryce**  
Capital Group | American Funds  
Camarillo, CA

Gary Bryce is a vice president and retirement plan counselor at Capital Group, home of American Funds, responsible for relationship management and sales development in greater Los Angeles. He has 13 years of investment industry experience and has been with Capital Group for eight years. Prior to joining Capital, Gary was a retirement plan wholesaler and a bilingual field service representative for Nationwide Financial. He holds a bachelor’s degree in business management with a finance emphasis from Brigham Young University. He also holds the Accredited Investment Fiduciary® designation. Gary is based in Los Angeles.

**Lawrence Deutsch, FSPA**  
Larry Deutsch Enterprises  
Fallbrook, CA

Larry is the founder and president of Larry Deutsch Enterprises, which has provided software to innovative TPA firms since 1985. Larry is also the founder and owner of Larry Deutsch's Penguin Consulting and Design, Ltd., which has provided pension and actuarial consulting services to pension consultants nationally since 1997. Larry has been active in the pension actuarial community since being enrolled in 1981, including authoring multiple articles, involvement with the Academy of Actuaries, the American Society of Pension Actuaries, the American Society of Pension Professionals & Actuaries, the College of Pension Actuaries and the advisory committee and exam committee to the Joint Board for the Enrollment of Actuaries.

**Kevin J. Donovan, FSPA**  
Pinnacle Plan Design, LLC  
Tucson, AZ

Kevin is the managing member and founder of Pinnacle Plan Design, LLC, a third-party administrator for employer-sponsored qualified retirement plans. A CPA and an Enrolled Actuary, Kevin specializes in designing cash balance and other defined benefit retirement plans to maximize the benefits for business owners and principals. He is co-author of the 2018 Defined Benefit Answer Book, published by Wolters Kluwer. In 2015, Kevin received ASPPA’s Educator’s Award in recognition of his contributions to retirement plan education. Kevin is a founding member of ACOPA, a current member of ACOPA’s Leadership Council and has served on the ASPPA Board of Directors as well as the Government Affairs Committee (GAC).

**Joe Faucher**  
Trucker Huss, APC  
Encino, CA

Joe Faucher has been litigating ERISA matters and other employee benefit related cases for nearly 30 years. His ERISA litigation experience includes defending actions for breach of fiduciary duty against retirement plan sponsors, administrators, trustees and other fiduciaries, defending ESOP fiduciaries, and representing plans and administrators in claims for benefits against retirement plans, disability insurance plans, health insurance plans and life insurance plans.

**James Goldstein**  
US Department of Labor  
Pasadena, CA
**James Goldstein**

James Goldstein is a Senior Investigator with the U.S. Department of Labor, Employee Benefits Security Administration, Los Angeles Regional Office. During his seventeen years with the agency, he has worked on many large civil and criminal investigations involving single-employer and multi-employer sponsored pension and welfare plans. Mr. Goldstein is a graduate of the University of California, Berkeley and the University of the Pacific, McGeorge School of Law, where he received an American Jurisprudence Award in Constitutional Law and earned a JD with honors. In 2012 he served as an adjunct professor at Southwestern Law School, where he co-taught a course in employee benefits law sponsored by the Department of Labor. He is a member of the California Bar.

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**Will Hansen**

American Retirement Association

Arlington, VA

Will is the Chief Government Affairs Officer for the American Retirement Association. He is an attorney with an LLM in Employee Benefits from The John Marshall Law School. He previously worked for The ERISA Industry Committee (ERIC), where he was the Senior Vice President of Retirement and Compensation Policy. Will joined ERIC from the Holland America Group where he served as Senior Manager of Global Employee Benefits overseeing employee benefit programs for five cruise brands under the Carnival Corporate umbrella. He previously served as the Executive Director of the United States Congress Joint Economic Committee, as well as Legislative Counsel for Senator Robert Casey, Jr. (D-PA), advising the Senator on tax, pension, budget, and social security issues, and as Legislative Director for Senator Tammy Baldwin (D-WI).

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**Elizabeth K. Harrington, QPA**

Benefit Resources, Inc.

Sacramento, CA

Beth has devoted her career to helping businesses design and administer state-of-the-art retirement plans. She established Benefit Resources in 1987 after graduating from the University of California at Davis and spending 8 years in the fields of banking, accounting, and financial planning. She is an IRS Enrolled Retirement Plan Agent and holds a certification as a Qualified Pension Administrator. Beth is a dynamic speaker and writer. She enjoys reading, playing tennis, and playing with her grandsons.

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**Craig P. Hoffman, Esq., APM**

Trucker Huss, APC

Atlantic Beach, FL

Craig’s practice focuses on federal tax and ERISA matters relating to the design, implementation and operation of tax-qualified retirement plans. He has over thirty-five years’ experience working in this area. Before joining Trucker Huss, Craig most recently served as General Counsel for the American Retirement Association, (“ARA”), a national organization of over 20,000 members who provide actuarial, consulting, administrative, legal, investment and other professional services for qualified retirement plans and tax-sheltered annuities. At ARA, Craig’s responsibilities included acting as Director of Regulatory Affairs where he interacted with high ranking officials at the Treasury Department, the Department of Labor and the IRS on matters of retirement policy. Craig also spent time on Capitol Hill meeting with members of Congress and their staff. He had previously served ARA as President, a member of the Board of Directors, Co-Chair of the Government Affairs Committee and Co-Chair of the Political Action Committee. Prior to joining ARA, Craig served for over 19 years as General Counsel to the Relius division of SunGard, which is now part of Fidelity National Information Services, Inc. (“FIS”).

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**James E. Holland, Jr., FSPA, FCA, MAAA, ASA, EA**

Cheiron, Inc.

McLean, VA
Speaker Biographies

Jim, chief research actuary for Cheiron, has over three decades of professional, managerial and public service experience working on issues relating to retirement plans and welfare benefit plans. He was a long-time official at the IRS before joining Cheiron. At the IRS, Jim held a variety of positions, was the chief of the actuarial branch for many years, and ended his career as the assistant director for the employee plans rulings and agreement area, where all aspects of the regulatory and legal guidance pertaining to pension plans is produced. In his roles, he often worked with officials from the Treasury Department, the Pension Benefit Guaranty Corporation, the Department of Labor and other government agencies. At Cheiron, Jim is providing his expertise to consultants and clients on a variety of pension related issues. Jim has been a frequent speaker at professional meetings where he made complicated regulations understandable to the pension community.

Aaron P. Karr, QKA
Ameriprise Financial
Roseville, CA

Aaron Karr works as a Financial Advisor for Ameriprise Financial.

Richard Kutikoff, MSPA
Pacific Benefit Services
Sherman Oaks, CA

Richard Kutikoff has over 30 years' experience as an actuary working with small and large clients on traditional pension plans, 401(k) plans, profit sharing plans, ESOPs and hybrid plans. Prior to establishing Pacific Benefit Services in 1993, he was a Consulting Actuary with William M. Mercer, where he was responsible for all actuarial, administrative, compliance and accounting issues for his clients.

He is an FSA and Enrolled Actuary. He is a member of the American Academy of Actuaries’ Pension Accounting Committee and a member of the Joint Board Advisory Committee. He holds a Chartered Financial Analyst designation, has a Masters in Applied Mathematics from State University of New York at Stony Brook and an MBA from UCLA.

Renee Noy
Workwise Law
Calabasas, CA

Renee earned her B.A., summa cum laude, from the University of Colorado at Boulder in 1997, and received her J.D. from the University of California, Hastings College of Law in San Francisco. Renee received her mediation certificate from the Straus Institute for Dispute Resolution at Pepperdine University. Renee worked a number of years at the prestigious Plaintiff’s law firm of Green, Broillette, & Wheeler, where she became proficient in representing plaintiffs against large corporations. In the last decade, Renee has represented countless employees in employment discrimination lawsuits, including cases involving disability, race, gender, and age discrimination, sexual harassment, wrongful termination, and a variety of wage and error disputes.

James C. Paul, APM
Employee Benefits Law Group
Folsom, CA

Jim provides practical and understandable guidance, advice and support to employers, plan sponsors and fiduciaries regarding qualified pension and profit sharing plans, welfare plans, nonqualified plans, executive compensation and other benefit programs. He is a member of the American Society of Pension Professionals and Actuaries (ASPPA). He served on the Leadership Council from 2012-2017 and is a past
Speaker Biographies

Kurt F. Piper, FSPA
Piper Pension & Profit Sharing
Venice, CA

Kurt graduated from the University of California, Berkeley, in 1976 with a degree in Mathematics and Rhetoric, and is an Associate of the Society of Actuaries (SOA), a Fellow of the ASPPA College of Pension Actuaries (ACOPA), and an Enrolled Actuary. He is a past President of ACOPA (ASPPA College of Pension Actuaries) and the Los Angeles Actuarial Club and has spoken before meetings of the American Academy of Actuaries, the Society of Actuaries, the American Society of Pension Professionals and Actuaries, the National Institute of Pension Administrators, and other organizations.

Martin L. Pippins, MSPA
American Retirement Association
Arlington, VA

Marty Pippins, a 30-year veteran of the IRS, served most recently as Director, Customer Service & Stakeholder Relations for the Services & Enforcement ACA office. Prior to that he was the Manager of Voluntary Compliance, Employee Plans Rulings & Agreements in the Tax Exempt & Government Entities (TE/GE) Division, where he was responsible for the IRS’ nationwide correction program for retirement plans. Pippins has held multiple positions at the IRS, including Manager of Employee Plans Technical Guidance and Quality Assurance, where he headed TE/GE’s published guidance team on retirement issues. He also served for more than four years on the Joint Board for the Enrollment of Actuaries (JBEA), including a term as chairman.

Adam C. Pozek, QPA, QKA, CPFA
DWC – The 401(k) Experts
Beverly, MA

Adam is a nationally known author and speaker with nearly 30 years of experience in the retirement plan industry. As a partner at DWC, Adam is known for designing customized plans for clients and assessing benefit programs in relation to mergers and acquisitions. He also consults with plan fiduciaries to help them establish and document prudent practices as required by ERISA. Adam is a Past President of American Society of Pension Professionals & Actuaries (ASPPA) where he. He is also a Past President and a long-serving former member of the Government Affairs Committee. He also served a 3-year term on the IRS Advisory Committee on Tax Exempt and Government Entities.

Robert M. Richter, J.D., LL.M., APM
American Retirement Association
Arlington, VA

Robert recently joined the American Retirement Association (ARA) as Retirement Education Counsel where he’s primarily responsible for maintaining the ERISA Outline Book and assisting with ARA educational programs. Robert was previously a vice president with FIS (previously SunGard and Corbel) where he managed the consulting department and was responsible for authoring and supporting FIS retirement plan documents. Robert served as President of the American Retirement Association in 2017 and in 2012 (ASPPA). Robert is a Fellow in the American College of Employee Benefit Counsel and is a member of The Florida Bar. Robert received a B.S., with a major in Finance, from the University of Florida, a J.D. from Florida State University, and an LL.M. in taxation from the University of Florida.

Mary Ann Rocco, EA, MSPA
Speaker Biographies

Mary Ann Rocco, EA Consulting Actuary
Huntington Beach, CA

Mary Ann started her actuarial consulting firm in 1987 in Huntington Beach, CA. Mary Ann’s firm provides actuarial services exclusively to Third Party Administration firms, with a focus on combination plan designs utilizing both Traditional and Cash Balance Defined Benefit Plans. Mary Ann has served on the COPA and ACOPA board of directors and acted as ACOPA President in 2010. Mary Ann is currently a member of ASPPA’s Government Affairs Committee and a frequent speaker at various conferences throughout the country.

Scott Ann MacDonald Setzer
Consultant
Roseville, CA

Scott Ann MacDonald Setzer is a self-employed consultant.

Holly L. Scott, CPC, QKA
Liden, Nestle, Soled & Associates
Westlake Village, CA

Holly L. Scott, is a Certified Pension Consultant and a Certified Financial Planner. She also is an Enrolled Retirement Plan Agent allowing her to represent clients before the IRS. With more than 25 years of experience, Holly serves as president of the Los Angeles chapter of the National Institute of Pension Administrators, and has co-chaired national and regional conferences for ASPPA and NIPA. Her technical expertise and creative problem-solving skills keep her clients’ plans running smoothly.

Meredith Sesser
Meredith J. Sesser, a Professional Law Corporation
Encino, CA

Meredith J. Sesser is among the nation’s leading authorities on employee benefits law, ERISA and benefits taxation. With 18 years of pension and ERISA experience, she routinely assists businesses and non-profit organizations in the preparation, implementation, operation and termination of retirement plans such as defined benefit and cash balance pension plans, 401(k) profit-sharing plans and 403(b) plans (plans for public education organizations, governments, religious institutions and non-profit organizations).

Sarah Simoneaux, CPC
Simoneaux & Stroud Consulting Services
Mandeville, LA

Sarah Simoneaux is the founder and president of Simoneaux Consulting Services. SCS specializes in helping financial services firms with strategic planning, recruiting and retaining nextgen employees, communication and presentation skills training and operations’ best practices. SCS’s nationwide customer base includes retirement software providers, employee benefit consulting firms, retirement plan recordkeepers, financial advisors and investment firms.

Sarah served as President of ASPPA in 2005-2006. She created and served as the ASPPA Educational Programs Advocate. She is the author of the textbook, Retirement Plan Consulting for Financial Professionals, and is the author of the NAPA Certified Plan Fiduciary Advisor (CPFA) online course. She created and conducts educational boot camps for candidates for the NAPA CPFA and ASPPA QKA credentials.
Speaker Biographies

Michael W. Spaid, FSPA, QPA
Internal Revenue Service
Seattle, WA

Mike is an Actuary in Actuarial Group 2 of the Internal Revenue Service. He routinely works on difficult and complex problems involving qualification under the Internal Revenue Code of pension and profit sharing plans as well as assisting with drafting published guidance such as regulations, notices, rulings, etc. EXPERIENCE • 25 years experience with qualified retirement plans. • Extensive involvement with retirement plans sponsored by large and small businesses as well as national social security systems and civil service retirement programs. • All aspects of defined benefit and defined contribution plan administration including trust accounting and analysis and disclosure as required by the Financial Accounting Standards Board. • Past Chairman of the EA 2 Segment B exam committee • Current Member of the Joint Board for the Enrollment of Actuaries • Speaker at numerous professional conferences and seminars PAST AND CIENTS INCLUDED • Social security and civil service retirement systems • Large and small US corporate clients

S. Derrin Watson, APM
Attorney
Goleta, CA

S. Derrin Watson, JD, APM, is of counsel to the Ferenczy Benefits Law Center, with over 42 years of experience in dealing with retirement plans. He is also an ERISA educator, frequently providing web seminars with ERISApedia and making presentations at seminars and conferences. Previously, Mr. Watson worked with FIS with their Relius line of educational programs and still consults with them regarding their plan document products. His published works include Who’s the Employer, the 403(b) Plan eSource, and the 457 Plan eSource, all published with ERISApedia, where he handles their Ask the Authors service. In 2006, ASPPA awarded Derrin its Educator’s Award for his work in providing professional education to plan practitioners. He received his bachelor’s degree in accounting from BYU and his law degree from UCLA. Derrin is a Senior Editor of the Journal of Pension Benefits.

Marcel P. Weiland
Employee Benefits Law Group
Folsom, CA

Marcel handles all areas of employee benefits law that impact private sector and nonprofit employers, including ERISA and Internal Revenue Code compliance. He focuses on qualified retirement plans, including ESOPs.

For 20 years, Marcel has helped clients attract and retain the best talent by facilitating meaningful benefits for their employees. By analyzing the business organization along with the benefits and fiduciary structures, he helps clients to ensure that their benefits align with the company’s strategic plans. Marcel’s comprehensive understanding of benefits designs, laws and regulations allows him to minimize tax and fiduciary exposure while enabling clients to meet their business goals.

Lynn Young
Pinnacle Plan Design, LLC
Phoenix, AZ

Lynn M. Young is a partner of the firm and is an enrolled actuary with over 31 years experience in the consulting and administration of qualified defined benefit, cash balance, and defined contribution plans. As an enrolled actuary, Lynn specializes in actuarial consulting and third-party administration of defined benefit retirement plans. Lynn is the Past-President of the American Society of Pension Professionals and Actuaries (ASPPA) College of Pension Actuaries (ACOPA). Lynn, along with fellow actuaries Sheri Alsguth
Speaker Biographies