Speaker Biographies

Kristina Archeval
Pension Benefit Guaranty Corporation
Washington, DC

Kristina Archeval is a Senior Advisor in the Corporate Finance and Restructuring Department (CFRD). CFRD monitors corporate events and transactions of defined benefit pension plan sponsors and provides financial analyses to enable PBGC to mitigate risks to the insurance program and protect the benefits of participants. In coordination with the Office of Chief Counsel, CFRD determines and pursues recoveries of employer liability and unpaid employer contributions, makes recommendations to the Director concerning the filing of liens, and makes recommendations to the Internal Revenue Service concerning conditions for granting waivers of minimum funding standards. Kristina joined PBGC in 2004 after spending 10 years in the private sector providing financial advisory services to large commercial banks with troubled loans.

Angela Barclay, EA
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.

Rick Block, FSPA, FCA, ASA
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.

Lauren Bloom
Elegant Solutions Consulting, LLC
Edgewater, MD

Lauren is the former General Counsel at the Academy, where she worked on the development and enforcement of the U.S. actuarial profession’s code of conduct and standards of qualification and practice. She has also consulted with the International Actuarial Association.
Speaker Biographies

**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, CPA, EA, FSPA, FCA**
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).

**Lorraine Dorsa, FCA, MAAA, MSPA, EA, CEBS**
Aegis Pension Services, Inc.
Ponte Vedra Beach, FL

Lorraine is an Enrolled Actuary and Certified Employee Benefits Specialist, a Fellow of the Conference of Consulting Actuaries and Member of the American Academy of Actuaries and the American Society of Pension Professionals and Actuaries (ASPPA). She has extensive experience providing defined benefit and cash balance plan design, consulting and actuarial support services to DC plan administrators, TPAs and financial institutions. Lorraine is a principal at Aegis Pension Services and a frequent speaker at employee benefits conferences including those sponsored by ASPPA, AICPA and other professional associations as well as seminars sponsored by financial institutions, plan sponsors and other groups.

**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).
Speaker Biographies

James E. Holland, Jr., FSPA, FCA, MAAA, ASA, EA
Cheiron, Inc.
McLean, VA

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.

John R. Markley, FSPA, CPC
The Retirement Advantage (TRA)
Lancaster, PA

John founded Markley Actuarial in 1985 and has over 30 years of experience providing services to qualified retirement plans. He has been active in the Government Affairs Committee (GAC) of ASPPA, a frequent speaker at ASPPA Annual, ACOPA Symposium, and other industry events. His areas of specialty include serving as a consultant to defined benefit pension plans, including large plans, municipal plans, and plans with employee contributions. He also serves as a consultant for FAS106 and GASB45 clients in the valuation of post-employment benefits other than pensions. He has a Bachelor of Science in Mathematics from the University of North Carolina and an MBA from Penn State University.

Kelsey N.H. Mayo
Poyner Spruill LLP
Charlotte, NC

Kelsey Mayo is a partner with Poyner Spruill LLP, a law firm based in North Carolina. Her practice is focused in the areas of Employee Benefits and Executive Compensation. She routinely represents clients before the Internal Revenue Service and Department of Labor and has extensive experience in virtually all aspects of retirement, welfare, fringe benefit, and executive compensation arrangements. Kelsey has a particular love for qualified and non-qualified pensions—so much so that she’s now passed 5 of the exams necessary for her ASA designation. As icing on the retirement-plan-geek cake, Kelsey spends her free time serving on both ASPPA and ACOPA’s Government Affairs Committees and co-editing the Journal of Pension Benefits.

Lauren R. Okum, ASA, EA, MAAA, MSPA
Premier Actuarial Solutions
Chicago, IL

Lauren is an actuary and the owner of Premier Actuarial Solutions, an actuarial firm that specializes in the design and administration of defined benefit and cash balance plans. She has practiced in the pension arena for more than 22 years. She currently focuses on small and mid-sized markets, consulting with employers maintaining pension plans as well as other third-party administrators who are looking to outsource their actuarial needs. Lauren is President-Elect of ASPPA College of Pension Actuaries, an Associate of the Society of Actuaries, an Enrolled Actuary, and a Member of the Academy of Actuaries. She graduated summa cum laude with highest distinction in Actuarial Science from the University of Illinois and Urbana-Champaign and attended Harvard Business School for her MBA.
Speaker Biographies

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.

Mary Ann Rocco, EA, MSPA
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.

Andrea Wong
Pension Benefit Guaranty Corporation
Washington, D.C.

Andrea Wong works at the Pension Benefit Guaranty Corporation.

Carolyn E. Zimmerman, FCA, MAAA, FSA, EA
Internal Revenue Service
Washington, DC

Carol Zimmerman, FSA, MAAA, EA has been working in Employee Plans and Ruling Agreements with the Internal Revenue Service for approximately 12 years, following 25 years of pension consulting with national firms. In her current position, she is involved in a number of activities including participating in several regulation projects and assisting practitioners and IRS personnel with technical questions. Carol is currently serving on the Joint Board for the Enrollment of Actuaries. She is a Fellow of the Society of Actuaries, an Enrolled Actuary, and a Member of the American Academy of Actuaries. She has also been active in the actuarial profession, as a past member of the Academy of Actuaries’ Pension Committee and speaking frequently at actuarial meetings.