

## ACLI Rising Leader Program Class of 2026



### Amber Adams

*Deputy Chief Compliance Officer, Life and Annuity  
Compliance Solutions  
National Life Group*

**Amber Adams** is Deputy Chief Compliance Officer at National Life Group. With over 20 years of experience in insurance law, compliance, and regulatory affairs, she has held senior roles including Chief Legal Counsel, Chief Compliance Officer and Assistant Secretary. Amber leads cross-functional teams in legal operations and product development and advises senior leadership on emerging legal and regulatory trends. She is a dedicated mentor to new legal and compliance professionals. Amber serves on several ACLI committees and is a member of LIMRA, LOMA, and CEFLI. Prior to joining IA American/American-Amicable, she held legal roles at AIG, American National, and the Texas Department of Insurance. Amber holds a J.D. from St. Mary's University School of Law and a B.A. in Psychology from the University of Houston.



### Rylee Allan

*Vice President, Digital Journeys and Innovation  
AAA Life Insurance Company*

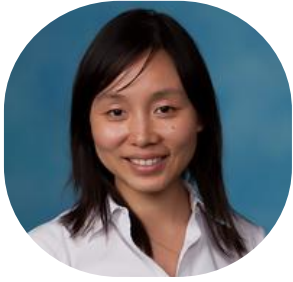
**Rylee Allan** is a visionary and results-focused technology executive with over 20 years of experience in insurance, fintech, and digital transformation. She currently serves as Vice President of Digital and Innovation at AAA Life Insurance Company and was previously Chief Technology Officer and Head of Product at Covr Financial Technologies. Rylee is known for aligning people, processes, and platforms to deliver lasting impact in regulated environments. Her expertise spans enterprise architecture, product development, and agile transformation, helping organizations drive efficiency and deliver customer-centric solutions. She blends strategic clarity with empathetic leadership, fostering inclusive innovation and high-performing teams. Rylee serves as executive sponsor of AAA Life's Asian American Associate Resource Group and is a strong advocate for women and LGBTQ+ leaders in technology. She also mentors emerging professionals and future leaders across the industry. Rylee holds a Bachelor of Science in Computer Science and an Associate of Science in Marketing.



## Craig Bartelsmeyer

*Director, Actuarial  
Kemper Life*

**Craig Bartelsmeyer** is an Actuarial Director at Kemper Life, leading efforts to modernize life insurance underwriting and enhance enterprise analytics since joining in April 2022. Previously, he was a Product Actuary at Illinois Mutual, where he redesigned the life portfolio and launched products focused on the middle market. His career centers on advancing data-driven decision-making across product development, compliance, and executive reporting. He holds a BS in Mathematics from The University of Alabama and an MS in Mathematics from Southern Illinois University. A Fellow of the Society of Actuaries and Member of the American Academy of Actuaries, Bartelsmeyer also serves as an SOA exam grader and mentors rising professionals. Passionate about leadership and community, he coaches youth Little League, leads his church's men's softball team, and sponsors a local bowling team—demonstrating his commitment to building strong, connected communities.



## Yi Chen

*Vice President, Capital Solutions  
Pacific Life Insurance Company*

**Yi Chen** is the Vice President of Enterprise Capital Management and drives the optimization of capital allocation and deployment in Pacific Life, and leads the establishment, transaction and implementation of affiliate reinsurance. Prior to Enterprise Capital Management role, Yi led Hedging and ALM for retail life and annuity business at Pacific Life, where she managed the equity and interest rate hedging programs and strategies across variable annuities, fixed index annuities and index universal life products, and drive the ALM reporting and strategies for all retail annuities and life. Before that, she headed the Annuity Pricing team at Pacific Life to launch multiple variable annuities, fixed annuities and fixed indexed annuities. Before joining Pacific Life, Yi worked at the derivatives trading desk at Aviva Investors. Yi graduated from University of Chicago with a degree of M.S. in Statistics



## Courtney Colby

*Director, Senior Counsel  
Thrivent*

**Courtney Colby** is Director and Senior Counsel at Thrivent, where she leads a team of attorneys and paralegals focused on insurance and operations law. In her role, she provides strategic legal counsel on a wide range of matters, including insurance product development, retirement plans, and tax-related issues. She collaborates cross-functionally across the organization, advising on key regulatory matters such as the Department of Labor's Fiduciary Rule and other complex compliance initiatives. Prior to joining Thrivent, Courtney was an associate in the Employee Benefits and Compensation group at Dorsey & Whitney LLP, where she advised clients on the full spectrum of employee benefit matters. An active leader in the legal and insurance communities, Courtney has held leadership roles in several professional organizations, including Association of Fraternal Benefit Counsel and Minnesota State Bar Association Employee Benefits Section. She earned her J.D. from Columbia Law School and holds a B.A. in History from Carleton College.



## Paula Cole

*Vice President and Head of Pension Risk Transfer  
Nationwide*

**Paula Cole** is Vice President and Leader of Nationwide Financials Pension Risk Transfer (PRT) business. As P&L CEO, she drives sales growth, manages expenses, and leads strategic initiatives to transfer pension liabilities from plan sponsors. With over 20 years of experience, Paula has successfully launched and transformed U.S. PRT businesses, including Nationwide's market entry, earning her the 2021 Sales Associate of the Year award.

A champion of inclusion and equity, she serves as President of Nationwide's African American Women Associate Resource Group and sits on the CEO Advisory Council. Paula also leads in the community as Board President of Thurber House and supports the National MS Society. She was recognized by Fortune's Most Powerful Women Next Gen Summit (2023) and Who's Who in Black Columbus (2024). A former collegiate athlete and certified personal trainer, Paula holds degrees in Sociology, Business Administration, and Operational Excellence.



## Patrick Gatland

*Vice President and Chief Compliance Officer  
Munich American Reassurance Company*

**Patrick Gatland** is a seasoned insurance executive with extensive experience in regulatory compliance, legal analysis, and operational risk management. Currently serving as Vice President & Chief Compliance Officer at Munich American Reassurance Company, he leverages his expertise to lead Munich Re US Life's regulatory compliance program and negotiate high-impact treaties and agreements. With a strong background in life insurance, reinsurance, and distribution, Patrick has held various leadership roles, including Head of Product and Governance at Global Life Distribution and Director at MetLife Direct. He holds an MBA from IE Business School and a Bachelor of Laws and Bachelor of Science from the University of New South Wales. Patrick also has a strong commitment to the immigrant community of New York City, as a proud immigrant himself, he has volunteered for over fifteen years at the International Center in New York, teaching English to new immigrants and refugees.



## Anthony Genna

*Vice President, Underwriting and Commercial Mortgage Loans  
Boston Mutual Life Insurance Company*

**Anthony Genna** is the Vice President – Underwriting and Commercial Mortgage Loans at Boston Mutual Life Insurance Company. He manages the company’s Underwriting and Commercial Mortgage Loan (CML) teams and is responsible for the profitable growth of both portfolios. Working closely with the company’s Workplace Solutions and Individual Solutions sales teams, external mortgage brokers, and management at all levels, he has responsibility for helping the company achieve its growth strategies and financial goals. Mr. Genna joined Boston Mutual Life as a manager in the company’s Underwriting department in 2016. He was appointed Second Vice President – Underwriting in June 2022 after three years as a Director in the Commercial Mortgage Loan Department. After the retirement of the Vice President – Commercial Mortgage Loans in December 2022 he assumed responsibility for the CML team as well. In August 2023 he was promoted to Vice President. Prior to Boston Mutual Life, Mr. Genna was a Special Risk Underwriter for Pan-American Life Insurance Company, specializing in Texas Non-Subscription, Travel Accident, and Truckers’ Occupational Insurance. He also held various product development roles at Pan-American. He is a board member of the Mendon (Massachusetts) Housing Authority and has been actively involved in high school and collegiate rowing in New England over the last 20 years. Mr. Genna holds a bachelor’s degree in international business from McGill University in Montreal, Canada, and a master’s degree in international relations from the University of Birmingham in England.



## Jeff Harms

*Controller  
Wellable, Inc.*

**Jeff Harms** is Vice President, Controller, at Wellabe, where he oversees accounting, financial reporting, taxes, reinsurance, expense management, accounts payable, and payroll. Jeff has thirteen years of insurance industry experience. He joined Wellabe in 2019 as Director, Financial Reporting, and was promoted to Controller in 2022. Prior to joining Wellabe, Jeff spent four years with Ernst and Young LLP, specializing in insurance in the audit and assurance practice, and three years in financial reporting at Athene USA. Jeff holds a Bachelor of Arts in Accounting and a Master of Accounting from the University of Northern Iowa. He is also a Certified Public Accountant. Along with his wife Morgan, Jeff is the proud parent of two children, Oliver (3) and Eloise (10 months). Jeff is an avid fisherman, secreting away to Minnesota once a year to see which is bigger: the walleye or the mosquitoes.



## Yanitsa Hill

*Lead Actuary, Head of Annuity Pricing  
Guardian Life Insurance Company*

**Yanitsa Hill** is the Head of Annuity Pricing at Guardian Life Insurance. She leads the actuarial efforts surrounding the product design and pricing of Guardian's suite of annuity products with a focus on delivering sustainable, consumer-first solutions. Her work sits at the intersection of actuarial rigor, market competitiveness, and cross-functional collaboration, shaping products that serve Guardian's policyholders while supporting long-term enterprise goals. Since joining Guardian, Yanitsa has led key initiatives including the launch of the company's first Registered Index-Linked Annuity (RILA), execution of complex reinsurance transactions, and technical leadership on ALM alignment and pricing model modernization. She works closely with investment professionals, reinsurers, and the product teams to ensure Guardian's offerings remain both profitable and market relevant. Yanitsa is an actuarial leader holding the Fellow of the Society of Actuaries (FSA) and a Member of the American Academy of Actuaries (MAAA) designations.



## Kelly Jarosinski

*Senior Project Manager  
American Family Life Insurance Company*

**Kelly Jarosinski** is a distinguished Senior Project Manager with over 13 years of experience in product and project management. Her exceptional leadership skills have guided cross-functional and cross-divisional teams in the successful planning, development, and delivery of innovative products. Kelly is recognized for her ability to coach colleagues in product, communication, and project management, fostering a collaborative and growth-oriented environment. Her expertise in life insurance products is complemented by her commitment to continuous learning through industry events and classes. Kelly excels in creating compelling visual and written storytelling tools that effectively communicate complex messages to diverse audiences. Beyond her professional achievements, she is dedicated to educational advocacy, serving on the board of directors for a non-profit educational organization and an elementary school PTO. Kelly holds a B.A. in English and Sociology from the University of Wisconsin-Madison and a Master's in Print Journalism from the University of Illinois at Champaign-Urbana.



## David Lockwood

*Senior Vice President and Chief Investment Officer  
Assurity Life Insurance Company*

**David D. Lockwood**, CFA, is Senior Vice President, Chief Investment Officer for Assurity Life. His responsibilities include oversight of the investments team and \$2.4 billion general account including corporate bonds, commercial mortgage loans, equities, real estate development projects, and alternative investments. He is also a member of Assurity's cross-functional Strategic Leadership Team. Before joining Assurity in 2015, he was Director of Investments at the Federal Home Loan Bank of Indianapolis where he was responsible for managing profitability of over \$15 billion in assets. Mr. Lockwood began his career at Commercial Federal Bank in 2002 where he held various positions including VP, Associate Portfolio Manager. Outside of Assurity, he serves as a Director of Security First Bank, a \$2 billion community bank serving customers in South Dakota and Nebraska. He volunteers as Chair of the University of Nebraska College of Business Finance Department Advisory Board and has nine years of youth basketball coaching experience. He also served as Board President for the adult literacy non-profit, Indy Reads, in Indianapolis, IN. Mr. Lockwood is a CFA charterholder and graduated from the University of Nebraska-Lincoln with Honors and Highest Distinction with a degree in business administration (finance emphasis).



## Caroline Madrak

*Vice President, Senior Client Manager  
Swiss Re Life & Health America Inc.*

**Caroline Madrak** is a Senior Client Manager at Swiss Re Life & Health with nearly 15 years of actuarial experience spanning pricing, valuation, assumptions, auditing, and client relationship management. She began her career at Prudential Financial, where she supported assumption development and led internal audits, and later held pricing and client-facing roles at Athene in Bermuda. At Swiss Re, Caroline partners with reinsurance decision-makers to deliver tailored solutions and uncover growth opportunities. She is a Fellow of the Society of Actuaries and holds an executive certificate in the Ethical and Responsible Use of Data and Predictive Models. Caroline is passionate about the evolving role of analytics in insurance and is recognized for her ability to build trusted partnerships and navigate complex challenges. As a former Division I lacrosse captain at Fairfield University, where she earned a B.S. in Mathematics, she continues to lead with collaboration, resilience, and integrity.



## Collin Newberry

*Principal, Financial Reporting  
Protective Life*

**Collin Newberry** is a Principal in Financial Reporting at Protective Life and specializes in addressing complex technical accounting issues across a wide range of topics, including investments, reserves, reinsurance, and insurance product accounting under both U.S. GAAP and Statutory accounting standards. He monitors emerging regulatory and accounting issues, contributes to industry discussions and comment letters, and serves as a key contact for auditors and regulators on technical accounting matters. He also assists with training on accounting topics. Collin has led major initiatives including the implementation of the FASB's Credit Loss standard, an IFRS impact assessment, and the development of COVID-19-related accounting policies. He also helped establish the company's initial GHG emissions calculation and sustainability reporting framework, and has supported numerous M&A transactions. Previously, Collin was a Senior Auditor at Ernst & Young, LLP. He holds a B.S. and M.S. in Accounting from the University of Alabama and resides in Birmingham, AL with his wife and daughter.



## John O'Shaughnessy

*Senior Director, Associate General Counsel, Law and Policy  
TIAA*

**John O'Shaughnessy** is a Senior Director, Associate General Counsel, Law & Policy with TIAA. He has spent his career advising firms on financial services legal and regulatory matters as both outside and in-house counsel. As the Law lead for TIAA's Advice Solutions and Digital & Client Experience businesses, John works closely business leadership to manage legal risk across TIAA's web and mobile experiences. Within TIAA's Law & Policy department, John is leading an effort to drive operational efficiencies by leveraging new technologies to develop a streamlined matter intake and matter management process. Prior to joining TIAA, John was in-house counsel for Charles Schwab and Capital One. He also worked in private practice advising banks and financial institutions. He holds a B.A. from Virginia Tech and a J.D. from The George Washington University Law School. He lives in Alexandria, Virginia with his wife, two children and two dogs.



## Ivan Parker

*Director, Actuarial*  
*Jackson National Life Insurance Company*

**Ivan Parker** is Director, Actuarial at Jackson National Life Insurance Company and has more than 15 years of actuarial experience. In his role, he has responsibility for the Pricing and Product Development team, overseeing the day-to-day operations of new money pricing for all product lines and development of new product initiatives. Ivan has spent his entire professional career with Jackson or its former parent company, London-based Prudential plc, working his way from an actuarial intern to a director in the department. Active within the industry, he serves on ACLI's RILA Working Group, is a member of the American Academy of Actuaries, a Fellow in the Society of Actuaries and a CFA Charterholder. Ivan earned a bachelor of science in mathematics and a specialization in actuarial science from Michigan State University.



## Jonathan Ruede

*Second Vice President, Strategic Planning and Execution*  
*Pan-American Life Insurance Company*

**Jonathan Ruede** is a Second Vice President of Strategic Planning and Execution for Group Insurance at Pan-American Life Insurance Group with 12+ years of industry experience. Jonathan works with executive leadership and functional areas of the business, supporting corporate, business unit, and local execution of strategic projects in the U.S. and globally. He leads cross-functional teams implementing initiatives focused on business development, strategic planning, and process improvements. Jonathan is also responsible for managing Pan-American's subsidiary agency in New Jersey, which sells Affordable Care Act major medical coverage and ancillary products. Jonathan has experience in product development, mergers and acquisitions, and green-field analysis for new business, divestitures, developing new commission structures, financial planning & analysis, and developing five-year plans. Jonathan received his J.D./M.B.A. focusing on International Business from the University of South Carolina and holds a B.S. in Business Administration with a focus on Finance and Economics from Charleston Southern University.



## Staci Schoorman

*Associate Vice President, Accounting Policy  
Sammons Financial Group*

**Staci Schoorman** is Associate Vice President, Accounting Policy at Sammons Financial Group. She is a Certified Public Accountant with 14 years of technical accounting and reporting experience. At Sammons Financial Group Staci is responsible for monitoring, interpreting, communicating and working collaboratively with individuals across the organization to implement new accounting guidance. In addition, she performs technical accounting research and planning to solve complex accounting issues as it relates to potential acquisitions, reinsurance transactions, investment opportunities and other unique transactions. Prior to joining Sammons Financial Group in 2019 she spent seven years as an auditor at Deloitte. Staci is actively involved in the children's liturgy ministry at her church and serves on the Audit and Finance Committee of Youth Shelter Services and the Board of Directors of Children's Cancer Connection. She holds a B.A. in Accounting from the University of Northern Iowa.



## Sarah Shives

*Compliance Manager  
Physicians Mutual Insurance Company*

**Sarah Shives** is a Compliance Manager at Physicians Mutual Insurance Company with over 20 years of experience in the insurance industry, specializing in compliance. She leads initiatives in regulatory oversight, corporate compliance programs, and emerging areas such as AI governance. Known for her strategic mindset and collaborative leadership, Sarah plays a key role in aligning compliance efforts with organizational goals. Prior to joining Physicians Mutual, she served as Compliance Lead at Wellabe, Inc., where she partnered across business units to support product development strategy and mitigate regulatory risk. Sarah holds a Bachelor of Business Administration from the University of Northern Iowa and a Master of Jurisprudence in Compliance and Risk Management from Drake University. She is passionate about ethical leadership, continuous improvement, and continued growth and development.



## Felicia Spivack

*Executive Director & Associate General Counsel,  
Regulatory and Government Affairs  
Trustmark*

**Felicia Spivack** is the Executive Director & Associate General Counsel – Regulatory and Government Affairs at Trustmark. In this role, she leads the company’s strategic approach to regulatory, legislative, and government matters, supporting both business units and the executive leadership team. Prior to joining Trustmark, Felicia worked in managed care regulatory affairs, most recently with the national healthcare consulting firm, Sellers Dorsey. Felicia holds a Juris Doctor from DePaul University College of Law and a bachelor’s degree in business administration from Loyola University Chicago. Felicia lives in Chicago with her husband, son (who will be attending University of Illinois this fall) and their Great Dane. She is passionate about fitness, enjoys exploring Chicago’s dining scene and attending concerts and music festivals with her son. A committed volunteer, Felicia gives her time to several community organizations, participates in the ACC Street Law Program, and serves on the Trustmark Foundation team.



## R.T. Stokes

*Operational Performance Manager  
Banner Life*

**R.T. Stokes** is the Operational Performance Manager at Banner Life. With over 29 years of leadership experience, he brings deep expertise in operational excellence, digital transformation, and commercial operations. He holds certifications as a Six Sigma Master Black Belt (MBB), High Performance Coach (CHPC), and Master Training Specialist (MTS). At LGA, R.T. Stokes collaborates with executive leaders to embed agile routines, foster a culture of coaching and continuous improvement, and drive customer-focused innovation. He holds a Master’s in Instructional Technology from Valdosta State University. Prior to joining LGA, he spent 11 years at GE Aviation and served 8 years in the U.S. Navy as a Submarine Strategic Weapons Supervisor. Beyond his professional role, he co-founded The Loving Creative with his wife, an initiative that uses creativity to support individuals facing cognitive decline, reflecting his commitment to community well-being and mental health advocacy.



## Robert "Tyler" Tieman

*Vice President and Managing Actuary,  
Asset Liability Management  
Reinsurance Group of America (RGA)*

**Tyler Tieman** is Vice President and Managing Actuary, Asset Liability Management (ALM) with Reinsurance Group of America (RGA). He is a Fellow of the Society of Actuaries (FSA), Member of the American Academy of Actuaries (MAAA), and a Chartered Enterprise Risk Analyst (CERA) with more than 11 years of actuarial experience in life insurance/reinsurance. At RGA, he works closely with senior leadership from Actuarial, Finance, Investment, and Risk Management functions to shape enterprise ALM strategy. He is responsible for leading the ALM area including strategic modeling, risk reporting, balance sheet management, and asset allocation activities. His prior roles at RGA include leading valuation and asset projection teams. Prior to joining RGA in 2017 he was an Actuarial Analyst with COUNTRY Financial in the life insurance area. Outside of work he enjoys spending time with his wife and three children and playing golf. He holds a B.S. in Actuarial Science from Maryville University.



## Ben Wadsley

*Head of Product Development & Pricing, Annuities  
Transamerica*

**Ben Wadsley** is Head of Product Development & Pricing for Transamerica's Annuity business. He leads annuity product development, product engineering, quarterly new business reporting, margin analysis, pricing, and rate setting. Ben's mission is to develop meaningful solutions for customers, at a reasonable price, while ensuring Transamerica's obligations to both current and future clients. Since joining Transamerica as an intern in 2002, he has served in key roles guiding product, asset/liability management, pricing, investments, new ventures, modeling and economic capital across various businesses. Ben is a council member of the Product Development Section of the Society of Actuaries and a former member of the ACLI Life Insurance Committee. He is actively engaged in his community of Cedar Rapids, Iowa as a board member of the Zach Johnson Foundation, a youth basketball coach, and a school volunteer. He earned a bachelor's degree in mathematics/actuarial science from University of Northern Iowa.



## Laura Whitaker

*Head of Insurance Risk  
Resolution Life*

**Laura Whitaker** is Head of Insurance Risk at Resolution Life, based in West Chester, Pennsylvania. She leads model risk management and collaborates closely with the first line of defense to evaluate actuarial assumptions, monitor emerging experience, and support regulatory and risk reporting. Laura played a key role in Resolution Life's recent U.S. strategic transaction with Farmers New World Life Insurance Company. Her prior experience spans annuity and life product development, model production, and corporate risk roles at Voya Financial and ING. She is a Fellow of the Society of Actuaries, a Member of the American Academy of Actuaries, and a Chartered Enterprise Risk Analyst. Laura earned her B.S. in Applied Mathematics with an Actuarial Science Concentration from West Chester University. Outside of work, she enjoys traveling, hosting themed parties, crafting, and volunteering at her children's school.