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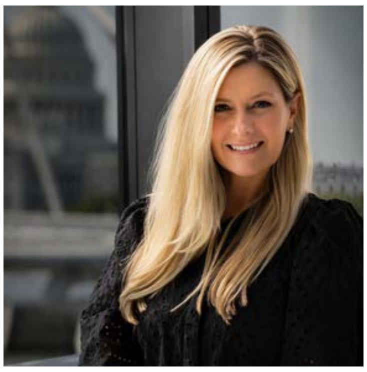

Kara Adame

Vice President, Federal Government Affairs

Protective Life

Kara Adame is Vice President and Head of Federal Affairs at Protective Life Corporation, based in Washington, DC. In this role, she leads the company's engagement on federal public policy issues impacting the insurance industry, representing Protective before Congress, the Administration, and key trade associations.

She brings extensive experience in insurance policy and political affairs, having previously led the Washington office for Mutual of Omaha and served as MetLife's Director of Political Affairs from 2015 to 2021, where she worked on issues including property and casualty, data privacy, and dental policy, while overseeing federal PAC operations and employee engagement.

Kara began her career at a pro-business consulting firm and held roles in Congress, state government, and national politics. She holds a degree in political science from the University of Missouri and is active in breast cancer awareness initiatives.

Brett Barratt

AVP, Government & Regulatory Affairs

Fidelity & Guaranty Life Insurance Company

Brett J. Barratt, Esq., is a seasoned insurance regulatory attorney and public policy leader with more than 20 years of experience spanning state insurance regulation, legislative advocacy, and industry trade group leadership. He is an Assistant Vice President for F&G Annuities & Life, Inc., in the Government and Regulatory Affairs Division. Recognized for translating complex regulatory developments into enterprise strategy, building trust-based relationships with regulators and legislators across multiple jurisdictions, and advancing industry positions at the state and national level. Before engaging in government affairs Brett spent fifteen years as an insurance regulator in Utah and Nevada in various management and legal roles, including as the Nevada Commissioner of Insurance and the Utah Deputy Commissioner of Insurance. Prior to beginning his insurance career, he practiced corporate bankruptcy specializing in creditors' rights and casino reorganization in Las Vegas, Nevada. In addition to his expertise in the life and annuity space, Brett has extensive experience in all aspects of insurance regulation, management, insolvency, and NAIC and legislative affairs on the state and national level. He is actively involved across ACLI policy, drafting, and strategy groups. Outside of his work hours Brett volunteers in his community in various ways including serving as the president of his HOA, supporting local little league baseball, local Boy Scotts of America, and served many years as the Board Secretary for the Utah Chapter of the Kids' Chance non-profit, which raises money to provide scholarships to children of workers who have been injured or killed on the job. He holds a BA from Westminster University and a JD from Michigan State School of Law.

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Shannon Berry

Vice President, Sales & Distribution

Ameritas

Shannon Berry is Vice President, Sales Development & Advanced Planning at Ameritas. She is a Certified Financial Planner (CFP®) with over 25 years of experience in the Financial Service Industry, both at a carrier and an advisor level. At Ameritas, she leads a multi-distribution channel sales organization which includes internal and external wholesaling, advanced planning, practice management, and field education.

Her role today is greatly enhanced by past experience as an advisor, regional vice president, and leadership roles in Ameritas' broker dealer/RIA. Shannon is a member of NAIFA, WIFS, FPA, and the Limra Agency Distribution Study Group and an interested participant in the ACLI Product Taxation Committee.

In addition to being a Certified Financial Planner (CFP®), Shannon has earned a bachelor's degree in management as well as the Fellow, Life Management Institute (FLMI), and Chartered Life Underwriter (CLU) designations. She holds Finra series 7, 24, and 66 licenses as well as life and health and property casualty licenses.
Outside of the office, Shannon has held several volunteer positions in her church and local high school.

Tamara Bogojevic-Catanzano

Senior Marketing Actuary

Somerset Re

Tamara Bogojevic-Catanzano is a Senior Marketing Actuary at Somerset Re, where she is responsible for originating and managing end-to-end reinsurance opportunities, with a focus on client prospecting, strategic planning, and relationship management. She has nearly two decades of experience in the life and annuity insurance industry spanning reinsurance, product development, pricing, valuation, capital management, and corporate actuarial functions.

Prior to joining Somerset Re in 2025, Tamara served as Vice President, Marketing Actuary at SCOR, where she managed key U.S. client relationships and reinsurance opportunities. Earlier in her career, she held actuarial positions at Fidelity Investments and Sun Life Financial.

Tamara is a Fellow of the Society of Actuaries and a Member of the American Academy of Actuaries. She is an active industry contributor through professional committees and speaking engagements. Outside of work, she volunteers through her church community and serves as a math tutor. Tamara graduated summa cum laude from Middlebury College with a Bachelor of Arts in Mathematics and Spanish.

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Wei-erh Chen

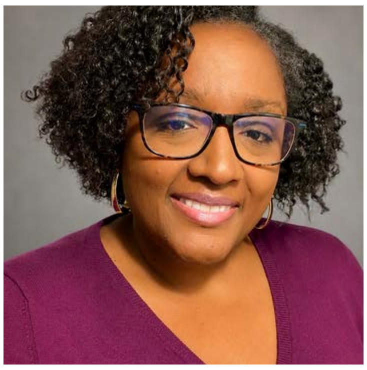
Assistant General Counsel

Principal Financial Group

Wei-erh Chen is an Assistant General Counsel at Principal Financial Group. He is an experienced attorney who has led numerous transformative initiatives across Principal's global enterprise, including complex insurance and reinsurance transactions, acquisitions and divestitures, asset management initiatives, capital markets projects, strategic partnerships, and related insurance company matters.

In addition, he leads a growing team of lawyers and paralegals and he regularly mentors Principal employees through formalized mentoring programs. Wei-erh worked in private practice before joining Principal where he focused on corporate finance and general business transactions.

He holds a Bachelor of Arts in Economics and Religion from the University of Northern Iowa, a Master of Theological Studies from Vanderbilt Divinity School, and a Juris Doctor from the University of Iowa College of Law.



Katrina Clark

Assistant Vice President,

Strategic Delivery & Governanced

Unum

Katrina Clark is Assistant Vice President, Strategic Delivery & Governance at Unum, where she leads strategic planning, governance, portfolio management, and execution oversight for the company's People & Communications organization. With more than 20 years of experience in the insurance industry, her career has spanned leave management operations, government affairs, inclusion and diversity, and enterprise strategy.

Throughout her tenure at Unum, Katrina has led large-scale business and workforce initiatives, developed governance frameworks, supported regulatory and compliance efforts, and partnered with senior leaders to align strategy with execution. She played a key role in establishing and advancing Unum's Inclusion & Diversity function, including the development of governance structures, employee networks, and leadership programs that strengthened employee engagement and organizational effectiveness.

Outside of work, Katrina serves as a board member of the SoLit (previously knowns as Southern Lit Alliance), volunteers with Big Brothers Big Sisters, and serves on the Executive Board of Zeta Phi Beta Sorority, Inc., Gamma Iota Zeta Chapter in Chattanooga, Tennessee. She earned both her Master of Arts and Bachelor of Arts in English from Middle Tennessee State University.

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Michele (Mac) Coppola

Senior Director, Investments

Everlake

Mac Coppola is a Senior Director within the Investment Strategy & Operations organization at Everlake, where he supports investment strategy, governance, and regulatory coordination. In his role, he partners across investment, accounting, and risk functions to enable thoughtful, well-executed decision-making and helps track regulatory developments to ensure alignment with evolving industry expectations. He is known for his collaborative approach and strong relationships with internal stakeholders and external partners.

Mac began his career at PwC in South Africa in the financial services group before transferring to Chicago, where he focused on asset management and insurance clients and advised on M&A transactions within the Financial Due Diligence group. He is a Chartered Accountant (SA) and holds Certified Public Accountant (CPA) and Chartered Alternative Investment Analyst (CAIA) designations. He is currently pursuing the CFA designation.

Joe Curtin

Vice President, Chief Underwriter IL Production

Gen Re

Joe Curtin is VP, Chief Underwriter, IL Production for Gen Re's Individual Life business. He leads facultative underwriting production, overseeing high quality decision making, team development, and alignment with enterprise underwriting strategy. In this role, Joe drives innovation across underwriting tools and processes, shapes underwriting philosophy and risk frameworks, and partners closely with clients to deliver strong underwriting outcomes.

Previously, Joe served as VP, Head of Underwriting Relationships, where he led strategic client partnerships, underwriting program assessments, and the client audit program. He has also held several senior underwriting and leadership roles across Gen Re, RGA, and Symetra, bringing more than 20 years of industry experience spanning direct and reinsurance environments.

Joe is actively involved in industry advancement, serving on the ALU Education Committee and the AHOU Program Committee. He frequently represents Gen Re at major industry events and has presented on behavioral economics and underwriting topics at conferences including the Texas Wide Underwriting Conference, the Farm Bureau Actuarial Conference, and to the Institute of Actuaries of Japan (IAJ) at the Society of Actuaries Conference.

He holds a degree in Business Management from Western Washington University and a Behavioral Economics Certification from the University of Chicago Booth School of Business. His professional designations include Certified FALU, FLMI, AFSI, ARA, and ACS.

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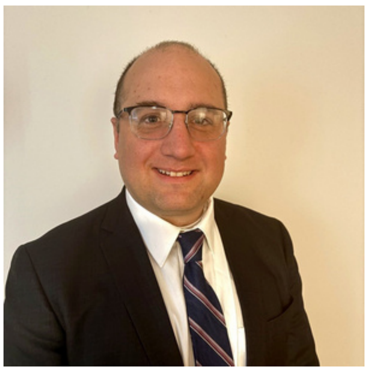

Brent Davis

Senior Economist

TIAA

Brent J. Davis is a Senior Economist at the TIAA Institute, a think tank within TIAA conducting research in financial literacy, lifetime income, retirement plan design, and behavioral finance. He leads the Institute's annuity and retirement income research initiative, with expertise spanning retirement income security, household finance, and behavioral economics. He regularly presents research findings to senior business leaders and at industry conferences, and his work has appeared in peer-reviewed journals including the Journal of Risk and Insurance and has been featured in NBC News, CNBC, and MarketWatch.

He joined TIAA in 2018, and earlier in his career was a faculty member at the University of Innsbruck in Austria. He serves on the Employee Benefit Research Institute (EBRI) Research Committee and the Defined Contribution Institutional Investment Association (DCIIA) Retirement Income and Managed Account Committees. He earned a Ph.D. and M.S. in Economics from Florida State University and a B.S. in Mathematics and Economics from St. Lawrence University. Outside the office, he is actively involved in Scouting America.

Amanda DeSousa

Assistant Vice President,

Supplemental Health Product

Lincoln Financial

Amanda DeSousa is a strategic product leader with over 15 years of experience in the group insurance industry, specializing in Supplemental Health, voluntary benefits, and product portfolio management. As Assistant Vice President of Product Management at Lincoln Financial, she leads product strategy, manages P&L performance, and drives innovation across her portfolio. She is recognized for translating complex market dynamics into actionable strategies that enhance competitiveness, profitability, and customer experience.

Amanda has built and led high-performing teams while partnering across actuarial, finance, distribution, underwriting, and operations to deliver market-leading solutions. Her leadership has supported major growth initiatives, including large-scale product refiles, expansion into new market segments, and development of scalable frameworks for long-term performance. She is known for disciplined governance, strong collaboration, and data-driven decision-making.

Previously, Amanda held leadership roles at MetLife and Lincoln Financial, driving voluntary benefits growth and go-to-market strategies. She serves on LIMRA's Supplemental Health, LTC, and DI committee.

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Class of 2027

Katie Dreiling

Head of National Broker and General Agency Partners
Guardian Life Insurance Company

Katie Dreiling serves as Guardian's Head of National Broker and General Agency Partners, managing Guardian's relationships with the industry's largest broker firms. Her role sits at the intersection of strategy and stewardship, while also overseeing broker advisory councils, and flagship industry events. Over the past 18 years, she's held national sales and distribution leadership roles at Guardian, Cigna, and Unum Group, leading growth strategies across group benefits, benefits technology, and supplemental health. She is known for building high-performing teams, industry advocacy, and translating market complexity into clear, executable strategies at scale.

Earlier in her career, she served as a finance liaison for a U.S. Senator and Governor and served as Student Body President of her University. She is an active community leader, having been nominated for the Leukemia & Lymphoma Society's Visionaries of the Year campaign and leads annual fundraising initiatives that support cancer research and local community causes.

Uzoma Ekenna

Government Relations Manager
Athene

Uzoma Ekenna is a Government Relations Manager at Athene, where she represents the company across domestic and international regulatory forums and supports policy engagement on issues including retirement security, regulatory modernization, reinsurance, private credit and investment risk. Before joining Athene, Uzoma held government relations roles at Pacific Life and Thermo Fisher Scientific, managing PAC operations, compliance, policy research, and stakeholder engagement.

She also previously worked at Wiley Rein LLP and in the U.S. House of Representatives. Uzoma holds an M.A. in International Relations from Queen Mary University of London and a B.S. in International and Comparative Politics from Appalachian State University.

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Kevin Faltin

Senior Vice President,
Chief Financial Officer and Treasurer
Assurity Life Insurance Company

Kevin Faltin is Senior Vice President and Chief Financial Officer of Assurity Life Insurance Company. A Certified Public Accountant with well over 20 years of experience, Kevin is a trusted advisor to leadership and the Board, known for technical rigor and sound judgment. Before Assurity, he began his career at Deloitte & Touche, rising to Senior Manager. He leads Assurity's finance organization, spanning accounting, actuarial, tax, and internal audit, serves as Chief Risk Officer, and contributes to Assurity's AI governance framework. Kevin holds industry leadership roles with the Nebraska Guaranty Fund Association and the Nebraska Insurance Federation, and participates on the ACLI Accounting Policy Committee and the IMR Working Group. In the community, he serves on the Board of the United Way of Lincoln and Lancaster County, the Nebraska Chamber of Commerce Foundation Steering Committee, and Lincoln Rotary Club 14. He holds a B.A. in Business Administration from Doane University.

Bess Ganeff

Head of Life & Health Underwriting and Claims US
Swiss Re

Bess Ganeff is Head of Life & Health Underwriting and Claims US at Swiss Re. She is responsible for leading underwriting strategy, risk selection, and claims of special interest across the U.S. market. Since joining Swiss Re in 2015 as an Underwriting Manager, she has held several leadership roles across underwriting, operations, and governance within the Americas Life & Health business. Prior to joining Swiss Re, Bess spent over a decade underwriting individual life insurance on the direct side and began her career within a brokerage general agency, where she gained experience in case management and contracting. Bess is an active industry contributor with highlights including serving on the Midwestern Underwriting Conference Committee since 2016 and serving on the AHOU Program Committee from 2019 to 2023. She holds a Bachelor of Arts in Literary Studies from Beloit College.

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Tori Howell

AVP, Sales and Distribution Securities Backed Lending
Nationwide Financial

Tori Howell is a dynamic financial services leader with more than 15 years of experience driving strategic growth, strengthening distribution partnerships, and delivering enterprise-wide initiatives. She currently serves as AVP, Sales and Distribution for Securities Backed Lending at Nationwide, where she leads efforts to expand lending solutions, deepen advisor engagement, and accelerate distribution strategy across key channels.

Throughout her career, Tori has demonstrated a strong ability to translate vision into action—most notably by successfully onboarding and enabling major distribution partners such as Edward Jones and Fidelity, accelerating advisor adoption of lending solutions and enhancing the overall client experience. She has led complex, cross-functional initiatives that drive business growth while aligning stakeholders across the organization.

Tori is widely recognized for her collaborative leadership style and her ability to influence across all levels of an organization. She is passionate about developing talent, fostering innovation, and building strong partnerships that create long-term value for both clients and the broader financial services industry. Her work reflects a deep commitment to advancing advisor-led strategies and expanding access to sophisticated lending solutions that meet evolving customer needs.
As an emerging leader in the financial services industry, Tori brings a forward-looking perspective and a proven track record of driving change. She is known for connecting strategy with execution, inspiring teams, and contributing meaningfully to the future of distribution and lending within the industry.

Jason Hoyle

Vice President,
Enterprise and Distribution Channel Marketing
OneAmerica Financial

A leader who takes pride in helping both the organization and his team achieve growth, Jason Hoyle promotes collaboration within OneAmerica Financial and throughout the financial services industry. By strengthening connections and bringing forth innovative ideas, Jason advances marketing across product and distribution, as well as brand and enterprise, to help bring more certainty to the audiences OneAmerica Financial serves every day.

Before joining OneAmerica Financial in 2022, Jason built a marketing career spanning more than 20 years. He has served as a vice president at Principal Financial Group and T. Rowe Price and holds extensive expertise in marketing and customer experience in financial services. Jason and his team at Principal Financial Group earned a 2018 North American Effie Advertising Silver Award for Principal's "We can help you plan for that" campaign. Additionally, through his leadership and vision, the OneAmerica Financial team won a 2025 Gold Stevie® award for thought leadership campaign of the year from the 2025 American Business Awards (ABA) organization. Jason started his career in marketing at SEI Investments and in merchandising at Lowe's Home Improvement, where he developed a passion for serving customers and helping them identify products that fit their needs. Jason received his MBA with concentrations in marketing and entrepreneurship from Wake Forest University and holds a bachelor's degree in American government from the University of Virginia. A die-hard University of Virginia Cavaliers sports fan, Jason lives outside of Washington D.C., with his two children and partner. Together, they enjoy visiting museums, mountain biking, baking, traveling to learn more about new places, people and cultures.

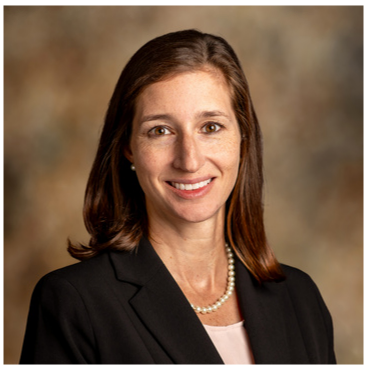
ACLI Rising Leader Program
Class of 2027

Christine Kaupa

Director, Actuary

Thrivent

Christine Kaupa is an Actuarial Director at Thrivent, leading a team responsible for the pricing, product development, and in force management of the company's annuity portfolio. She partners across the enterprise to advance product strategy, delivering competitive solutions while maintaining disciplined risk management. Christine also leads Thrivent's annual dividend and surplus recommendation across life, health, and annuity product lines, applying an equitable approach to deliver value to clients. Previously, in a life insurance role, she drove accelerated underwriting program enhancements and implemented a framework to improve mortality risk transparency. Christine is a Fellow of the Society of Actuaries and a Chartered Enterprise Risk Analyst, and she earned a B.S. in Mathematics with a Statistics concentration from St. Olaf College. Outside of work, she enjoys building community through shared interests like running and giving back through volunteer service at her children's elementary school and other local organizations.



Joni Kazmierczak

Vice President of Operations

Catholic Order of Foresters

Joni Kazmierczak is the Vice President of Operations at Catholic Order of Foresters, bringing over 11 years of dedicated expertise to the fraternal insurance sector. Her comprehensive background spans organizational governance, information technology, cybersecurity, business analysis, new business, insurance services, and member engagement. Known for bridging the gap between people, processes, and technology, Joni is committed to driving strategic objectives that benefit her organization, teams, and members.

Beyond her professional responsibilities, Joni is deeply invested in community leadership. She actively serves on local school district committees, holds PTA executive roles, and volunteers in youth sports and scouting—contributions that earned her recognition as a local Character Counts! honoree.

Joni holds a B.S. in Industrial Engineering from the Georgia Institute of Technology. Outside of work and family life, she is an avid trail runner frequently training for her next half marathon.

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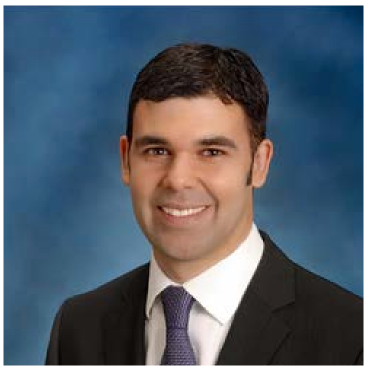
Tushar Kinger

Head of Technology Development

Resolution Life

Tushar Kinger is a technology executive with 22 years of experience transforming the US life insurance industry through bold digital and AI strategy. At Resolution Life US, he leads a global team of 200+ technologists and is driving the company into Agentic AI. The two-time recipient of Resolution Life's President's Award holds a BTech in Computer Science from NIT Jamshedpur, is an AWS Certified AI Practitioner, and completed Harvard's Advanced Negotiation program in 2023.



Gregory Kitchen

New Business Ventures Principal

USAA

Gregory Kitchen is a Transformation and New Business Ventures leader at USAA with 19 years of financial services experience across life insurance, annuities, investments, management consulting, M&A, strategic partnerships, competitive intelligence, and advisory roles. As New Business Ventures Principal in Life Company Transformation, Greg turns ambiguous opportunities into decision-ready strategies into execution plans. In 2025, he helped develop and mature strategic partnership capabilities, evaluated more than 50 partners and emerging providers, advanced development of the Transformation Management Office, and created measurable savings, cycle-time reduction, and member-value opportunities. He has supported acquisition due diligence, operationalized and scaled startups within USAA, piloted AI-enabled capability work, and built cross-functional forums connecting operational business partners, Finance, HR, Change, Risk, Legal, Compliance, and external partners. Greg holds an MBA and multiple strategy, innovation, and competitive intelligence designations and serves on the Our Lady of the Lake University Alumni Advisory Board locally.

Victoria Liu

AVP & Actuary of Life Product Strategy

Pacific Life Insurance Company

Victoria Liu is an AVP & Actuary of Life Product Strategy at Pacific Life Insurance Company. In this role, Victoria drives the development and prioritization of the company’s comprehensive life product portfolio, encompassing IUL, UL, VUL, Term, and COLI. She is responsible for developing the product roadmap and establishing short and long-range product strategies built on a deep understanding of customer needs, competition, and market dynamics. Additionally, She collaborates with other functions to build and execute go-to-market plans for entering new markets. In all of these roles, Victoria brings a strategic mindset, capacity for thought leadership, and team building leadership skills that supports the development of other leaders. Prior to joining Pacific Life in 2018, she held roles as a lead pricing actuary for individual life reinsurance at Munich Re and as an actuary in insurance liability modeling at John Hancock. She holds a Bachelor of Mathematics from the University of Waterloo and is a Fellow of the Society of Actuaries.

ACLI Rising Leader Program
Class of 2027

Porus Prakash

Senior Portfolio Manager, Head of Structured Credit
Talcott Financial Group

As Head of Structured Credit, Porus is responsible for Talcott Financial Group's General Account strategy and implementation, with a focus on Public and Private Asset Based Finance investment strategies. Porus has 16 years of experience in the Investment Management industry, and prior to joining Talcott, held roles in Structured Credit Portfolio Management and Trading at KKR, Global Atlantic, and BlackRock. He started his career in the Risk and Quantitative Analysis group at BlackRock. Porus holds a Bachelor of Science in Engineering from Cornell University.

Georgina Shepard

Assistant General Counsel
MetLife

Georgina Shepard is Assistant General Counsel at MetLife, where she advises the Group Benefits distribution organization on strategy, regulatory compliance, and external compensation frameworks. She partners with senior leadership to design contractual and governance structures that support growth while advancing transparency and regulatory alignment across broker and third-party distribution models.

Georgina is actively engaged in shaping industry policy, contributing to cross-functional initiatives focused on distribution cost transparency and evolving compensation practices. Her work reflects a broader commitment to strengthening trust and clarity in how insurance products are delivered to employers and employees.

Previously, Georgina advised on sanctions, anti-money laundering, and anti-bribery laws, achieving favorable outcomes in government inquiries and securing regulatory approvals to support global operations. She began her career in private practice focused on investigations and enforcement in highly-regulated industries.

Georgina is recognized for her practical leadership and commitment to advancing a more transparent, accountable insurance marketplace.

ACLI Rising Leader Program
Class of 2027

Amanda Weaver

Vice President & Counsel, Government Relations
John Hancock

Amanda Weaver is a seasoned government relations executive based in Arlington, VA, where she lives with her husband, children, and their beloved dog. With a distinguished career in the insurance industry, Amanda excels in legislative affairs, policy analysis, and advocacy. Currently serving as Vice President of Government Relations at John Hancock, she leads strategic state government affairs and legislative initiatives. Her efforts in creating alliances with political and organizational leaders have effectively supported key business initiatives. Previously, Amanda played a pivotal role at Health Care Service Corporation during the Affordable Care Act's implementation, and served as Government Relations Counsel and Chief State Liaison at the National Association of Insurance Commissioners. A graduate of The Catholic University of America's Columbus School of Law, Amanda is admitted to the Pennsylvania State Bar. Outside of her professional life, she has passion for travel and running.

Michael Witt

Vice President and Senior Actuaryd
Reinsurance Group of America

Michael W. Witt is Vice President and Senior Actuary with Reinsurance Group of America (RGA). He is a Fellow of the Society of Actuaries (FSA) and Member of the American Academy of Actuaries (MAAA) with more than 21 years of actuarial and insurance leadership experience. At RGA, he leads inforce management for the U.S. Individual Life business, guiding strategic initiatives that improve financial performance, create embedded value, and strengthen client relationships. Prior to joining RGA in 2014, he was a Consulting Actuary with Milliman, where he built and led the São Paulo Life Practice. He also serves on the Board of College Bound in St. Louis and frequently volunteers as a sports coach. He holds a B.A. in Mathematics and History from The College of William & Mary.