

## ACLI Rising Leader Program Class of 2024



### Afsheen Aslam

*Chief Compliance Officer, US Insurance  
John Hancock*

**Afsheen Aslam** joined Manulife Financial Corporation “Manulife” in 2016. In her first role, Afsheen served as Compliance Director and Counsel for the Affinity Markets Insurance business. Afsheen managed a team of compliance professionals, oversaw the execution of the regulatory compliance program, and advised the business on compliance with regulatory requirements. In 2022, Afsheen was appointed Chief Compliance Officer, US Insurance with John Hancock, a subsidiary of Manulife. In this role, Afsheen oversees the regulatory compliance management activities for all active and in force US Insurance businesses, including life insurance, long-term care insurance, and annuities. Outside of work, Afsheen enjoys cycling, cooking, and exploring the world with her family.



### Jennifer Baker

*Chief Compliance Officer, US Insurance  
John Hancock*

**Jennifer Baker** is an experienced in-house attorney with Standard Insurance Company and certified Privacy Law Specialist. She also has a deep understanding and knowledge of group life and disability claims administration and plan design. In addition to assisting her business partners in navigating the challenges of a constantly evolving and complex legal and regulatory environment, she is an active member of the ACLI's Privacy Committee.

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### Sara Bodnar

*Assistant Director, Annuity Compliance  
Principal Life Insurance Company*

**Sara Bodnar** is currently the Assistant Director of Annuity Compliance at Principal Life Insurance Company (PLIC), part of Principal Financial Group. She leads the Annuity Compliance Team and provides comprehensive analysis and guidance on laws, regulations, and complex annuity compliance issues. She has a diverse background which provides a broad scope of industry knowledge. Starting in a branch office as an administrative assistant and client servicing associate gave her the understanding of what it is like to work directly with clients and the ability to recognize the pain points in the sales process. Sara then advanced through the following positions: a senior compliance analyst at an OSJ, a suitability team supervisor at a BD, and an operations manager at the same BD. Now working at an insurer, these roles have built a foundation for a deep understanding of potential purchasers of PLIC products and how various distribution partners sell to them. In addition to her compliance responsibilities, Sara enjoys being involved in guiding the culture of the company she is at. She's previously sat on a women's resource group, lead a Veteran's resource as a civilian ally, and currently is on the steering committee for Principal's Veteran's Employee Resource Group. Outside of work, she has sat on the board of a non-profit that provides school supplies to underprivileged children and leadership opportunities to all children. She also volunteers at a camp that, through community grants, gives inner-city children the opportunity to experience a week in the remote woods of Minnesota. She has 3 children, Conner, 16, Logan, 13, and Daniel, 2, and enjoys gardening, running, and being with her family.



## Whytne Brooks

*Vice President, Governmental Affairs  
New York Life*

**Whytne Brooks** is a Vice President in New York Life's Office of Governmental Affairs (OGA). As a member of the federal advocacy team, Whytne is responsible for advancing the financial, reputational, and operational interests of New York Life, its agents, and its policyowners before Congress and the Administration on legal, privacy, underwriting, diversity & inclusion and other public policy issues. She collaborates with New York Life executives to determine the company's policy position and priorities, and establishes relationships with members of Congress and their staff across political parties in order to build our brand and establish New York Life as a thought leader. Whytne joined New York Life in 2015 as Assistant General Counsel on the Litigation team in the Office of the General Counsel (OGC), and was promoted to Associate General Counsel in 2018. She took on her role in OGA in May 2019 and was promoted to Vice President in September 2020. She previously served as a member of New York Life's EMC-appointed Social Justice Working Group and Co-Chair of the Black Employee Resource Group. Prior to joining New York Life, Whytne worked as a Litigation Associate at Simpson Thacher & Bartlett LLP, where she represented Fortune 100 companies in a variety of commercial litigation matters, including mergers and acquisitions, bankruptcy, securities and False Claims Act litigation for U.S. and international clients. She is a recipient of the firm's Pro Bono Recognition Award, Legal Services NYC's Pro Bono Recognition Award, and Her Justice's Commitment to Justice Award. Whytne is a member of the New York City Bar Association's Board of Directors. She previously served as Chair of the NYC Bar Association's Committee on Minorities in the Profession, and Co-Chair of Legal Services NYC's Pro Bono Associate Advisory Board. Whytne earned a B.A. from Yale University and a J.D. from Columbia Law School. She is an avid runner and Formula 1 racing fan.



## West Dickens

*Annuity Product Actuary  
Protective Life*

**West Dickens** is an Annuity Product Actuary for Protective Life. His responsibilities include fixed annuity product development and pricing, management of reinsurance relationships, and review of annuity exception cases. Since joining Protective Life in 2014, West has worked on both life and annuity productive development and pricing, as well as serving as the Actuarial Student Patron who oversees exam performance and rotations for two years. He was also selected to represent Protective at the Dai-ichi Life Global Talent Exchange for actuaries from all subsidiaries in 2019. Outside of Protective, he volunteers for the Society of Actuaries as an exam question writer and grader and serves on the finance committee of his local congregation. West received a Bachelor of Science in applied mathematics from Auburn University, is a Fellow of the Society of Actuaries, a Chartered Enterprise Risk Analyst, and a Member of the American Academy of Actuaries.



## Annabelle Espinoza

*Director, Marketing Compliance and Monitoring/Testing  
Bestow Life Insurance Company*

**Annabelle Espinoza** is an experienced compliance professional with over 20 years of experience in the life/health insurance industry. She has also directly supported Operational Risk and Compliance initiatives to lead and implement organizational change throughout her career. She has over 12 years of experience in addressing regulatory complaints and inquiries and 10+ years of experience leading corporate stakeholders in Life, Marketing Compliance, and Operational Risk programs and initiatives. In her most recent role as Director of Marketing Compliance and Monitoring/Testing at Bestow Life Insurance Company, she has continued to utilize her expertise in compliance and risk management to ensure the organization's adherence to regulatory requirements. Before this, she served as a Marketing Business Risk and Control Advisor Senior at USAA, advising senior management on the status of organization issues, controls, and processes within Enterprise Strategy and Marketing. Annabelle was responsible for facilitating over 96 regulatory compliance internal and external exams in the past and served as the primary resource for Issue Management. Annabelle holds a BA in print journalism and public relations from Troy University.



## Beth Goldsmith

*Second Vice President,  
Practice Management and Development  
Ameritas*

**Beth Goldsmith** is a highly accomplished professional as the Second Vice President of Practice Management and Development at Ameritas. With a master's degree in business and an emphasis on organizational development, Beth brings a unique blend of expertise to her role. Beth is widely recognized for her exceptional contributions to Ameritas, where she has led the development of the practice management resource program from inception to success. Her visionary approach transformed the field education at Ameritas, resulting in the creation of an on-demand learning curriculum and platform, empowering employees to acquire knowledge at their own pace. Additionally, Beth spearheaded the implementation of a new learning program that caters to diverse audiences, utilizing learning differentiation strategies to maximize impact. As a driving force behind innovation at Ameritas, Beth has successfully managed large-scale projects, such as the sports marketing platform and the establishment of a dedicated cohort for female financial professionals. Her ability to identify and leverage opportunities has propelled the organization forward, while her commitment to diversity and inclusion initiatives has fostered a more inclusive and equitable workplace. Beth's mastery of organizational development principles, coupled with her strategic thinking and leadership skills, have been instrumental in shaping Ameritas' growth and success. Her dedication to empowering individuals and teams to reach their full potential has earned her respect within the industry. Outside of her professional achievements, Beth is known for her passion for continuous learning and her dedication to fostering a collaborative and supportive work environment. She actively seeks opportunities to mentor and inspire others, reflecting her commitment to personal and professional development.



## Bill Graves

*Assistant General Counsel,  
Security Mutual Life Insurance Company of New York*

**Bill Graves** graduated Cum Laude from Syracuse University College of Law in 2016. After law school, Bill joined a law firm in Binghamton, New York, where he practiced as an Associate Attorney in the Business & Banking Department focusing on contract drafting and negotiation, mergers and acquisitions, company formations and corporate and partnership buy/sell agreements. In March of 2021, Bill joined the legal team at Security Mutual Life Insurance Company of New York where he serves as Assistant General Counsel. Bill works closely with the business departments at Security Mutual Life with respect to various compliance and operational matters. Bill expects to complete his Chartered Life Underwriter (CLU) designation in the Summer of 2023. A Binghamton native, Bill is a strong supporter of the community and, in his spare time, performs locally as a musician in a band.





## Courtney Hess

*Associate General Counsel, Regulatory Affairs  
Corebridge Financial*

**Courtney Hess** is Associate General Counsel, Regulatory Affairs, for Corebridge Financial. In her role, Courtney manages a team of attorneys and examination coordinators who handle state insurance market conduct exams, inquiries, investigations, and required reporting. Courtney also leads the legal team's regulatory monitoring and advocacy efforts supporting Corebridge businesses, coordinating closely amongst internal stakeholders, government affairs colleagues, and industry trade organizations, to promote Corebridge's positions on a variety of topics. As part of this role, Courtney co-manages activities of the Corebridge Public Policy Council, a forum of executives and senior leaders that develops Corebridge policy initiatives and thought leadership. Courtney also leads the legal team's regulatory change management function, overseeing a team responsible for intake and description of new laws and regulations impacting Corebridge, to impacted compliance areas. Outside of her day-to-day responsibilities, Courtney is engaged in Corebridge legal team learning and volunteer initiatives, leading the team's Growth and Development Working Group, co-leading its Innovation Legal Practice Group, and serving as a member of the Pro Bono Committee. Prior to joining Corebridge Financial, Courtney held legal, compliance, and legislative affairs positions with the State of Tennessee Department of Treasury, supporting and advising the State's defined benefit and deferred compensation plans, risk management program, and unclaimed property division and leading legislative advocacy efforts. Courtney received her Juris Doctorate as well as Bachelor of Arts degrees in economics and public policy from Vanderbilt University.



## Michael Nesbitt

*Actuarial Manager  
Venerable*

**Michael Nesbitt** is an Actuarial Manager at Venerable. He leads the RBC team. Michael has led the development of robust RBC analysis and understanding through the company since origination of Venerable in 2018. In addition, he tracks regulatory proposals and changes, participates in ACLI calls and communicates. While at Venerable Michael has also participated in policyholder behavior assumption reviews, most notably lapse, mortality, and guaranteed minimum withdrawal benefit utilization, and has assisted on analysis of various strategic action considered or executed. Prior to Venerable, Michael held various roles for ING and Voya Financial from valuation, modeling, and product management. Michael is a graduate of Lebanon Valley College with a Bachelor of Science in actuarial science. He is a Fellow of the Society of Actuaries and a Member of the American Academy of Actuaries.



## Jennifer Pepin

*Product Strategy Lead  
Aflac*

**Jennifer Pepin** is a Product Strategy Lead for Aflac Premier Life Absence and Disability Solutions and handles paid statutory leave programs in more than 12 states including statutory disability, paid family leave and paid family and medical leave. She has worked in the personal and group insurance industry for more than 15 years. Jennifer has operational experience from managing long-term disability claims, to overseeing a Legal and Arbitration department, to her current work with paid statutory leave programs. Located in New Hampshire, Jennifer has both a master's degree in education and a law degree from New England School of Law. Pairing her education and her background in statutory benefits, she has become a subject matter expert and educator for programs such as paid family leave, disability leave, paid family medical leave, and the newly legislated voluntary paid family leave products.



## Kory Petoske

*Director, Underwriting Rules and Innovation  
Sammons Financial Group*

**Kory Petoske** is Director of Underwriting Rules and Innovation at Sammons Financial Group. Kory leads a team that is responsible for the underwriting rules for the accelerated and automated underwriting programs. He is also responsible for the vendor relationships and is an active participant in ACLI's Algorithmic Accountability Working Group and the Risk Classification Committee. Prior to taking this role in 2020, Kory worked in many different underwriting positions at Sammons Financial. During his tenure, he has been involved in many different strategic underwriting projects and implementations of underwriting systems. Kory joined Sammons Financial in 2007 as an underwriting trainee. He moved up the underwriting ladder and moved into Underwriting Manager and Sr. Automated Underwriting Rules Specialist roles prior to taking on his current responsibilities. Kory earned a bachelor's degree in business management from Dakota Wesleyan University in Mitchell, South Dakota.



## Venese Rhodes

*Senior Counsel  
MetLife*

**Venese Rhodes** is Senior Counsel in the Product Tax group within the MetLife Law Department. In this role, Venese provides her in-house business partners with tax advice on annuity and life insurance products in the qualified and non-qualified tax markets. Venese also provides federal and state tax advice on the resolution of customer complaints, error correction and exception requests and issues relating to tax withholding and reporting. In addition, Venese previously served as a member of MetLife's Sustainability Reporting team coordinating the full legal review of MetLife's published sustainability reports and questionnaires for six years. In 2009, Venese started her career with MetLife as a Legal Assistant and after completing law school as a part-time evening student received a promotion to Corporate Counsel in 2016. Venese received a second promotion in 2019 into her current role of Senior Counsel. Senior Leadership's identification of Venese's growth potential within the organization has led to her selection to participate in various internal and external talent development programs, such as the MetLife Talent Stewardship program, MetLife Excelerate program and most recently as a Pathfinder at the Leadership Council on Legal Diversity (LCLD) Pathfinder. Venese received her LLM in Tax from NYLS in 2018, her Juris Doctor (cum laude) from NYLS in 2015, and a Bachelor of Arts in forensic psychology and Bachelor of Science in legal studies from John Jay College of Criminal Justice.



## Edgar Rodriguez

*Distribution Finance Director, Care Solutions  
OneAmerica*

**Edgar Rodriguez** is the Care Solutions Distribution Finance Director responsible for the financial management of OneAmerica's Long Term Care Insurance portfolio. Edgar joined OneAmerica in 2021 and his experience with the organization spans across data strategy, incentive plans, financial planning, and reporting. Prior to OneAmerica, Edgar spent three years as a Senior Finance Manager at Stanley Black & Decker's Security Division leading financial planning & analysis efforts, providing key decision insights for business development deals with national retailers and other fortune 500 companies, and driving go-to-market strategies on emerging electronic security technologies. Edgar's career began at Eli Lilly & Company where he spent six years across various finance functions including general accounting, internal audit, SAP integration, and commercial finance. During his time at Lilly, Edgar led the financial reporting of Lilly's largest commercial entity and the international Elanco SAP testing efforts of the Novartis Acquisition. Edgar's experience at Lilly expanded his international impact, which he demonstrated by working across 10 countries through short-term assignments, projects, and audit engagements. Edgar earned his bachelor's degree in finance and accounting from Texas A&M University - Kingsville and a master's degree in business administration from Purdue University's Daniel School of Business.





## Daniel Roe

*Assistant General Counsel  
Transamerica*

**Dan Roe** joined Transamerica in 2019 and leads the Workplace Solutions Employee Benefits (EB) legal team as Assistant General Counsel. He works closely with the EB leadership team within Workplace Solutions to grow Transamerica's suite of life insurance and supplemental health benefits in compliance with current insurance regulations. Dan also collaborates with other functional business units, including Compliance & Government & Policy Affairs, to oversee the successful development, administration, and sales of health and life products. Before joining Transamerica in 2019, Dan served as an Associate General Counsel at UnitedHealthcare and Maxim Healthcare Services and as an Assistant Attorney General and Assistant State's Attorney for the State of Maryland. Dan earned a Bachelor of Arts degree in English literature and writing from Fairfield University in Connecticut and a Juris Doctorate from the University of Dayton School of Law. Dan is an active member in the Baltimore Chapter of the Association of Corporate Counsel and LIMRA and ACLI supplemental health committees. Dan resides in Maryland and volunteers for several local organizations.



## Regina Saint Jour

*Assistant Vice President, Tax Planning, Audits & Advisory  
Lincoln Financial Group*

**Regina Saint Jour** is the Assistant Vice President of Tax Planning, Audits, & Advisory at Lincoln Financial. She joined Lincoln Financial in 2022 and has over 15 years of international, federal, and state and local tax experience. Regina is proficient in federal and state tax controversy, tax structuring of private equity investments, debt investments, reinsurance transactions, mergers & acquisitions, and compliance matters (including ASC 740, ASC 740-10, and ASC 450-20). Prior to joining Lincoln Financial Group, Mrs. Saint Jour was Tax Counsel at MetLife. While at MetLife, her responsibilities included advising on state and local tax matters, advising on the tax aspects of private equity, reinsurance, real estate, and tax credit transactions, documenting domestic and international transactions, and general advice on matters impacting the consolidated federal tax return. Regina began her career at a Big Four Accounting Firm where she worked on federal and state and local tax matters. Regina graduated with her LLM in taxation from the University of Florida – Levin College of Law, where she served as Graduate Editor on the Florida Tax Review. She received her JD from Florida A&M University College of Law where she graduated in the top 10% of her class and served as Editor-in-Chief of the Florida A&M University Law Journal. Regina received her undergraduate degree from Tougaloo College. Regina is married with two children. She is very passionate about community service and volunteers with Metropolitan Ministries of Tampa Bay. Regina is a contributor to A Kids Place, a safe haven that keeps siblings together in a safe, stable, and nurturing environment.



## Alison Samborn

*Associate General Counsel, Insurance Legal  
Jackson National Life Insurance Company*

**Alison Samborn** is Associate General Counsel, Insurance Legal with Jackson National Life Insurance Company. She is responsible for overseeing and managing insurance legal services relating to Jackson's annuity and insurance business, providing advice and support related to the company's overall insurance business, including suitability, licensing, regulatory comment letters, product contracts for both fixed and variable annuities, product administration and distribution, and oversight of the SEC filing process. Ali also directly supervises the Insurance Legal team, which handles all legal aspects of product development, product administration and SEC product filings under federal securities laws. Prior to joining Jackson, Ali spent a decade as a practicing litigation attorney with specialties including construction law, mortgage and title insurance litigation, fire, explosion and electrocution litigation, and workers compensation defense. She also gained two years of insurance claims experience with Farm Bureau Financial Services, handling highly complex and litigated workers compensation claims. Ali holds a bachelor's degree in classical civilizations from the University of Michigan, and a juris doctorate from Wayne State University School of Law in Detroit, Michigan.



## Rupal Shah

*Principal, Head of Fixed Income Insurance Client Advisory  
PGIM*

**Rupal Shah** is a Principal and the Head of PGIM Fixed Income Insurance Client Advisory. Rupal partners with the Head of Insurance Solutions to drive PGIM's third-party insurance efforts and grow their third-party insurance footprint. Her responsibilities include business development, client service and product strategy to ensure PGIM's product set fits appropriately into insurers' nuanced requirements. She is also tasked with ensuring PGIM has the technology and resources to sufficiently service their insurance clients. She joined PFI from JP Morgan Chase in 2014 where she managed strategy for two years for Chase Private Client, the affluent arm of the retail bank. Prior to that role, she was a senior client relationship manager at Goldman Sachs Asset Management and worked with large market corporate pension plans and GSAM's strategic partnership clients. She spent 9 years at Goldman Sachs in various roles prior to joining JPMC. She received a BS from Rutgers Business School Honors Program in 2002 with majors in finance and MSIS and an MBA in 2009 from The Stern School of Business, NYU with a concentration in corporate finance and financial markets. She serves as the Treasurer and Board Member of IWIN, The Insurance Women's Network and has spent the past two decades working on boards of various charitable organizations, including Junior Achievement, New Eyes for the Needy and Essex County Family Justice. She helped drive each of their missions, was integral to the growth of the organizations and their respective social media platforms. Currently, she serves as Co-Head, Vice President and Board Member of Orphan Life Foundation (OLF), which is a charity that aids in various educational and non-educational programs for the betterment of orphans, in countries such as Burkina Faso and India. In her free time, she enjoys running (successfully completing the NY Marathon three times) and 20 half marathons around the world, vacationing with her family, reading, and spending time with her Bernedoodle.



## Eric Solfisburg

*Head of Investment Product Consulting  
MassMutual*

**Eric Solfisburg** is the Head of Investment Product Consulting in the \$35bn Institutional Insurance business of MassMutual. He focuses on the investment aspects of Bank-Owned Life Insurance (BOLI) and Corporate-Owned Life Insurance (COLI) policies and serves as a resource to MassMutual clients, prospects, and partners. Prior to this role, he was an Assistant Vice President at State Street Global Advisors working with insurance company general accounts and insurance asset managers. Prior to SSGA, Eric was an Associate Director & Investment Consultant at UK based institutional consultant and OCIO manager River and Mercantile Solutions, where he worked in various capacities as a senior analyst, head trader, field consultant and portfolio manager focusing on asset / liability management for financial sponsors. Eric holds a BSBA with concentrations in finance & strategic management from Babson College. He has earned the Chartered Financial Analyst (CFA®) designation, the Chartered Alternative Investment Analyst (CAIA) designation, the Chartered Life Underwriter (CLU®) designation and the Chartered Financial Consultant (ChFC®) designation. Additionally, he carries the Series 7 and Series 63 licenses. He is a member of the CFA Institute, CFA Society Boston, CAIA Association and the serves on the Board of Directors of the Children's Trust of Massachusetts as well as the Board of Trustees of Old Colony Montessori School. He lives in Scituate, MA with his wife, two daughters and dog.



## Susan Stegman, MD

*Vice President, Medical Director  
Northwestern Mutual*

**Dr. Susan Stegman** is a Vice President Medical Director in the Underwriting department at Northwestern Mutual. In 2005 while still working as an internal medicine physician in private practice, she began her insurance medicine career as a part-time medical director at Ohio National Financial Services. Over the next 10 years she worked in similar roles at Southern Farm Bureau Life Insurance and Nationwide Insurance, working directly with underwriters to assess mortality risk on life insurance applicants. In 2015, Dr. Stegman left private practice for a full-time medical director position with Equitable (formerly AXA) where in addition to production duties, she also presented to in-house and industry underwriter groups on numerous medical topics and was a member of the Empowerment committee. In 2017, she served on the American Academy of Insurance Medicine Annual Meeting planning committee and attained board certification in Insurance Medicine. In 2019, Dr. Stegman joined Northwestern Mutual as a Vice President Medical Director and expanded her skills to include disability underwriting as well as disability and long-term care claims evaluations. She continues to serve as a presenter for underwriter training, having recently given talks on obstructive sleep apnea and mood disorders. During the pandemic, Dr. Stegman organized a departmental Steps Challenge to encourage employees to exercise regularly. Recently, she compiled research for a position paper related to the impact of climate change on the U.S. insured population. In addition, she is a member of the ACLI Risk Classification committee and is the Program Chair for the 2024 ACLI Medical Section Annual Conference. Susan graduated from the University of Notre Dame with a Bachelor of Arts in pre-professional studies and government and obtained her medical degree from the University of Cincinnati College of Medicine. She has been married for 33 years to her husband Scott and has 3 grown children who now live in Chicago, Salt Lake City and Washington D.C.



## Jennifer Stockdale

*Director of Marketing and Community Engagement  
GBU Life*

**Jennifer Stockdale** joined GBU Life in 2019 and is the Director of Marketing and Community Engagement where she oversees brand engagement for paid, owned and earned media as well as fraternal benefits and district and charitable activities. A graduate of Washington and Jefferson College, Jennifer has managed marketing and business development for companies in a wide variety of industries, such as transportation, retail and manufacturing. She is currently serving as Secretary of the Washington County Manufactures' Association as well as Second Vice President for the New York/New Jersey Fraternal Alliance.





## Barbie Walsh

*Institutional Executive Relationship Manager  
Nationwide*

**Barbie Walsh** is the Institutional Executive Relationship Manager with Nationwide and focuses on large case strategic account management and working with the team on large corporate sector plans. She has had over 24 years of diverse retirement plan experience. She has served as a VP and Sr. Relationship Manager in prior roles. She has successfully cultivated key relationships with economic buyers and external consultants and advisors across the mid and large institutional market. She is dedicated to partnering with clients in the defined contribution industry to design and implement successful retirement plans for their employees with a focus on plan design, fiduciary best practices, and employee engagement. Barbie received her Bachelor of Arts in sociology, from Baylor University in Waco, Texas and her Master of Science in organizational leadership and management from Regis University in Denver, Colorado. She is based in Colorado Springs, Colorado where she lives with her husband Bill and sons Carter and Peyton.



## Jerusha Washington

*Associate Director, Compliance  
Sun Life US*

**Jerusha Washington** is a skilled insurance professional with over 11 years of experience. She has dedicated the last 8 years of her career to specializing in Regulatory Compliance Management (RCM), currently serving as an Associate Director of Compliance at Sun Life US. She leads Sun Life's US RCM Test Program in this role, with a focus on regulatory risk management, demonstrating her expertise in evaluating controls and assessing their effectiveness. Throughout her professional journey, Jerusha has demonstrated a commitment to enhancing client experience. As a subject matter expert in complaint handling, she aided in improving customer satisfaction. Additionally, she served as a resource for investigating fraud allegations, showcasing her dedication to maintaining integrity and trust within the industry. Jerusha's career began on the frontlines of service as a call center representative, where she gained invaluable insights into customer needs and expectations. Outside of work, Jerusha is passionate about making a positive impact on her community. For the past 15 years, she has been a member of Alpha Kappa Alpha Sorority, Inc., contributing to various philanthropic initiatives. In 2020, Jerusha created the Sun Life Black Excellence Alliance Mentor Program, where she serves as Program Manager and mentor. This program enriches the lives of high school students by providing guidance and support for their personal and academic development. As a proud alumna of the University of Missouri, Jerusha is dedicated to helping students pursue higher education and explore career opportunities. She firmly believes in the power of community and actively contributes to its growth and well-being. Jerusha cherishes quality time with her husband and children, seeking out new adventures together. As a self-professed foodie, she enjoys family trips that involve exploring different cuisines, satisfying her curiosity for diverse culinary experiences. Jerusha's thirst for knowledge is evident as she consistently seeks opportunities to learn and strives for excellence in all aspects of her life.



## Christine Williams

*Vice President, Chief Compliance,  
Privacy and Anti-Money Laundering Officer  
Boston Mutual Life Insurance Company*

**Christine Williams** is Vice President – Chief Compliance, Privacy, and Anti-Money Laundering Officer at Boston Mutual Life Insurance Company. Christine is responsible for fostering a fully compliant environment at Boston Mutual Life, including interfacing with state and federal regulators. She also has oversight responsibility for producer contracting and commissions. Prior to Boston Mutual Life in 2018, she was most recently Anti-Money Laundering and Compliance Officer at Matrix Venture Capital Management. Previously, she served as Assistant Vice President, Compliance, at Global Atlantic Financial Group. She held various positions at Aviva USA, including Director, Compliance; Director, Operational and Regulatory Risk; Senior Risk Analyst; and Market Conduct Analyst, as well as Manager, Licensing & Commissions. She began her career at Sun Life Financial in 1994. Christine was a member of the Association of Certified Anti-Money Laundering Specialists (ACAMS) and earned a Sanctions Compliance Certificate in 2017. She holds an Associate Customer Service (ACS) designation from the Life Office Management Association (LOMA). She has also been a member of the Risk Insurance Management Society (RIMS) and the Society of Insurance Licensing Administrators (SILA). Ms. Williams is a notary public in Massachusetts. She is a graduate of EXCELeRate, one of the talent and leadership development programs at Boston Mutual Life. She is actively involved with local community organizations, including School on Wheels of Massachusetts and My Brother's Keeper. She was previously involved with United Way and Big Brothers Big Sisters. She has served as a youth soccer coach and a licensed U.S. soccer referee. She also served as Secretary on the Board of Directors for the West Des Moines Soccer Club. Christine holds a bachelor's degree in sociology and a minor in psychology from Fitchburg State College in Fitchburg, Massachusetts. She also holds a master's degree in business administration with concentrations in leadership and entrepreneurship from Walden University in Minneapolis, Minnesota.



## Tommy Wade

*Senior Vice President, Key Account Manager  
Swiss Re*

**Tommy Wade** is responsible for building and developing business relationships with US based L&H insurance carriers at Swiss Re. In his role, he works with clients on traditional reinsurance, large transactions, structured solutions, automated underwriting, predictive analytics, financial technology, and more to cultivate long-term partnerships. Tommy started his career in Equity Research at Prudential Financial covering the large-cap global industrial companies. He then moved to a new job at UBS Financial in the PWM Business advising on investments and trading securities including equities, fixed income and commodities. From there, he made a career move into Investment Banking advising on M&A transactions for (Re)insurance Companies and Financial Institutions at Willis Towers Watson before joining Swiss Re. Tommy graduated from Colgate University with a degree in english literature and economics and has over 16 years of experience working in the Finance, Banking & (Re)insurance industries, executing complex transactions, leading teams, performing market research, developing new business strategy and managing large projects & day-to-day business operations. He lives in Rockville Centre, New York with his wife Katie and twins Alexander & Isabelle.