

**From November 2009
to November 2015**

**Reliance Mutual Insurance Society Ltd
Actuarial consultant**

From 1 November 2009 I took the opportunity of partial retirement and worked for Reliance Mutual under an employed contract for two and a half days a week. I fully retired in November 2015.

My role focussed mainly on project related work. I managed various short term projects that have used my long experience and knowledge of Reliance's procedures. Major projects I managed related to merger and acquisition activity which was a major source of growth for the company. I was involved in pricing and negotiating the transaction, drawing up the legal agreement, and managing the project that leads to the Part VII transfer of the business.

I played a major role in the Society's corporate restructure in 2012, writing the Scheme of Arrangement and the associated communications to be sent to policyholders. I advised my CEO on my perception of how the various issues impact the company and the actions open to the Board.

My final activity was leading the work and providing the technical expertise behind a project to outsource the Society's investment and investment accounting functions. This has enabled me to use my deep knowledge of the company and its complex fund structures to maximum benefit.

I have broad technical knowledge of all aspects of life assurance, in particular issues facing with profits companies and the mutual sector. I believe that my wide experience has given me the skills to review results and other work presented at a high level, to see any areas of weakness, and to challenge appropriately.

April 1988 – October 2009

**Reliance Mutual Insurance Society Ltd
Deputy Actuary (to Dec 2001)
Actuarial Function Holder (from Jan 2002)**

Reliance Mutual was a small mutual insurance company with assets of about £1.7 bn. My position as Chief Actuary and a member of the senior management team, reporting to the chief executive, gave me wide experience of corporate management, including significant input into strategic planning. I attended all board meetings, and presented many of the papers myself. Writing clear, concise reports is one of my skills. Leading the actuarial team involved the full range of activities of an insurance company. Although small, Reliance Mutual had a very wide range of policies and all types of life insurance business. However, as a small company the role was very much a hands-on practitioner.

Reason for leaving:

My volunteer work for the Institute of Actuaries (see below) was increasing, and I therefore did not want a full-time job. I was becoming less enthusiastic about management responsibilities, which were growing, and wanted to spend more time on technical actuarial work.

1977 - March 1988

**National Provident Institution
Finally, Manager of Actuarial Services Department**

The Actuarial Services Department contained four sections with the following functions:

Valuation:	Valuations, statutory returns, bonus modelling, expense analyses.
Rates:	Premium rates and terms on which existing contracts are transacted.
Statistics:	Analysis and preparation of a wide range of management reports.
Data Management:	Securing the integrity of data on all the company's computer files.
Reason for leaving:	To further career.

Honorary Work for Institute and Faculty of Actuaries

Since completing the professional examinations, I have been heavily involved in actuarial education on a voluntary basis, although this work is now diminishing. After having been an examiner for the Institute and Faculty of Actuaries examinations, I was chairman of the Board of Examiners for two years from 2010 to 2012. I served the Profession as chair of the Education Board and a member/chair of numerous other education-based ad hoc groups. Effectively I was the lead volunteer on matters of education for the UK actuarial profession, stepping down in July 2016 as part of the normal rotation of volunteer responsibilities.

I spent 2016-2018 heavily involved in syllabus development for the new curriculum introduced in 2019. I also spend time writing and reviewing textbooks and other education materials. I have been independent examiner for the actuarial science courses at several UK and Irish universities. I am currently a moderator for actuarial examinations set by the Actuarial Society of South Africa.