

# DANIEL THEODORE

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Consulting Actuary

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## Current Responsibility

Dan is a principal and consulting actuary in the New York office of Milliman. He joined the firm in 1996.

## Professional Work Experience

Dan consults on product development of life insurance and annuities, as well as New York and SEC compliance issues. He has been involved in a wide range of projects related to private placement variable life, both onshore and offshore. Other assignments have included IRC Section 7702 compliance review, reinsurance, assisting companies analyze exposure and value proposed settlements under market conduct class action. Dan has also assisted clients in the life settlement market, analyzing policy values and developing financial projections using both deterministic and stochastic models. Prior to joining Milliman, Dan had more than 14 years of actuarial experience in the life insurance industry.

Dan has helped guide products from initial conception through the design, pricing, administration, and marketing phases to final rollout. He provided actuarial support for illustration systems testing and review of marketing materials. He was also responsible for actuarial issues raised in SEC and state filings of new policies. This often involved the unique problems in product design, contract language, and actuarial memorandums related to policy form filings in New York. He has worked with traditional participating insurance policies and riders, Second-to-Die coverage, universal and variable life insurance, and both fixed and variable deferred annuities.

## Professional Designations

- Fellow, Society of Actuaries
- Member, American Academy of Actuaries
- Chartered Life Underwriter
- Chartered Financial Consultant

## Education

- Dan has served on the Society's Examination Committee.
- He has served for several years on the Annual Meeting and Continuing Education Committees of the Actuarial Society of New York (ASNY).
- Dan has also been elected by ASNY's membership to VP-Continuing Education (July 2002-June 2004) and President (July 2004-June 2005).

## Presentations and Publications

Dan has spoken at meetings of the Society of Actuaries and the Actuarial Society of Greater New York. He has written articles published in Contingencies magazine, the National Underwriter Life/Health Edition, and the Society's Product Development News.