

2019 Elected Board Member

Fiduciary and Governance Duties

- Establish financial policies and ensure accountability.
- Ensure compliance with applicable laws and ethical standards.
- Monitor organizational performance using balanced scorecard management system.
- Authorize appointment of committees as necessary for the conduct of the affairs of the Society of Actuaries, including the appointment of joint committees with one or more other organizations.
- Prescribe examinations and other requirements for admission as provided in Article III, Section 2, of the Bylaws, and facilitate study for such examinations.
- Review the annual audit of the SOA by an independent auditor and act on recommendations.
- Approve an annual budget and operating plan for the SOA, including a schedule of member dues and fees.
- Through the Finance Committee, invest and administer the funds and establish appropriate financial controls for the investment and administration of such funds.
- Amend the By-Laws as needed.
- Review, approve, amend or rescind the actions of any committee except the Discipline Committees.