

***ERIC 2015 Spring Committee & Membership Meetings***

**Speaker Biographical Summaries**

**Andy R. Anderson**

*Partner*

*Morgan Lewis & Bockius LLP*

Andy R. Anderson is a partner in Morgan Lewis's Employee Benefits and Executive Compensation Practice. He has handled a variety of employee benefits matters, including government self-correction programs, cafeteria plans, health and welfare plans, VEBAs, and benefit plans for tax-exempt organizations and churches. He has worked with numerous Fortune 500 companies regarding the administration of employee benefits programs, with an emphasis on the administration of health and welfare plans. Mr. Anderson frequently counsels clients on regulatory compliance issues dealing with the Internal Revenue Code, ERISA, COBRA, HIPAA, Mental Health Parity, and Healthcare Reform.

Mr. Anderson's practice also focuses on outsourcing employee benefits issues in the areas of retirement plans, health and welfare plans, and payroll practices. Prior to joining Morgan Lewis, Mr. Anderson led the Hewitt Associates' legal group responsible for outsourcing employee benefits.

Mr. Anderson has commented on proposed regulations, testified at IRS hearings, and testified before the Senate Judiciary Committee on ERISA preemption. He also worked closely with several government agencies during the launch of the advance credit for the TAA tax credit. Mr. Anderson has lectured extensively on the subject of employee benefits and outsourcing. He is a JCEB faculty member, where he teaches the cafeteria plan section for the ERISA Basics class. He has been quoted in employee benefits articles for various publications, including *Forbes*, *CNN Money*, *Business Insurance*, *The New York Times*, *The Wall Street Journal*, *Law360*, *Human Resource Executive Online*, and *BNA*.

Mr. Anderson received his J.D. from the University of Illinois College of Law in 1984 and his B.A., *summa cum laude*, from MacMurray College in 1981. He is admitted to practice in Illinois.

**Sarah Arbes**

*Deputy Health Policy Director*

*U.S. Senate Committee on Health, Education, Labor, and Pensions*

Sarah Arbes currently serves as deputy health policy director in Republican office of the U.S. Senate Committee on Health, Education, Labor and Pensions (HELP). U.S. Senator Lamar Alexander (R-TN) is the ranking member of the committee. In her role, Sarah is responsible for private health insurance policy, including the new health insurance exchanges created under the 2010 healthcare law.

Prior to joining the HELP Committee, Sarah served in the office of U.S. Senator Mitch McConnell (R-KY), where she worked on health, tax, labor and retirement policies. Before Sen. McConnell, Sarah was vice president of government affairs at the Retail Industry Leaders Association (RILA). In this role, Sarah was responsible for the association’s health care, labor/employment and technology advocacy. In so doing, she led the association’s efforts to carve out part-time workers from the health insurance reform law’s employer mandate and to defeat the Employee Free Choice Act.

Before joining RILA in 2007, Sarah served in the George W. Bush Administration as a congressional liaison at the U.S. Department of Labor. In this role, she lobbied Congress on comprehensive immigration reform, Family and Medical Leave Act regulatory updates, and women’s pay parity legislation. Sarah also spent four years in the office of U.S. Senator Jim Talent (R-MO) where she assisted immigrants with visas and auto workers affected by mass layoffs.

Prior to working in politics, Sarah was a media planner and buyer at several advertising agencies, advising clients on print, radio, outdoor and online ad placement and cost. Sarah holds a Master of Public Administration from the Maxwell School of Syracuse University and Bachelor of Arts in Journalism from The University of Oklahoma. She and her family reside in Annandale, Virginia.

**Jim Armbruster**

*Acting Deputy Chief Counsel*

*Pension Benefit Guaranty Corporation*

Jim Armbruster is Acting Deputy Chief Counsel of the Pension Benefit Guaranty Corporation, where his work focuses on Title IV of ERISA. He has been at PBGC for 27 years, including 24 years as a supervisor of other attorneys. For much of that time he was the lead advisor to PBGC’s benefit-payment department, providing guidance on the Title IV guarantee and asset-allocation rules. He also served for a time as head of PBGC’s Legislative and Regulatory Department, and has been involved in many of PBGC’s regulatory activities. He is a recipient of PBGC’s Distinguished Career Service Award.

Jim was one of the lead attorneys in PBGC’s landmark victory in the Supreme Court in *PBGC v. LTV Corp.* (1990), a unique case involving administrative law, bankruptcy, and Title IV. He was also instrumental in negotiating the ensuing comprehensive settlement.

Jim has argued a number of cases in the federal courts of appeals, including *Davis v. PBGC* (D.C. Cir. 2013) and *PBGC v. Scherling* (8th Cir. 1990). In *Davis*, the court upheld a number of PBGC benefit interpretations, including on the priority for benefits of retired participants in the Title IV asset-allocation scheme. In *Scherling*, the court agreed with PBGC that the Title IV statute of limitations applies to fiduciary actions that PBGC brings as trustee of a terminated plan.

Before joining PBGC, Jim was a litigation associate at Arent Fox and a law clerk to Judge James Belson of the D.C. Court of Appeals. He earned his J.D. from Yale University and his B.A. from LeMoyne College.

**Brad Bailey**

*Assistant to the Speaker for Policy*

*Office of the Speaker of the U.S. House of Representatives, John A. Boehner*

Brad Bailey is a member of Speaker Boehner’s policy team where he handles the economic policy portfolio. His issue set includes tax law, trade policy, regulation of financial markets and institutions, social security, certain other domestic entitlement programs, and U.S. monetary policy. In this capacity Brad works closely with his counterparts in Congress and the Administration to further these policy issues.

Prior to joining the Speaker’s Office, Brad worked for Congressman Patrick J. Tiberi (R-OH) and the Russell Group. Brad is originally from Westerville, Ohio and now resides in the Capitol Hill neighborhood of Washington, DC. He holds a Juris Doctor from the Georgetown University Law Center in Washington, DC and a Bachelor of Science in Finance from Miami University in Oxford, Ohio.

**Mary Nell Billings**

*Sr. Director, Global Retirement Programs*

*Hilton Worldwide*

Mary Nell Billings is currently Sr. Director Global Retirement Programs for Hilton Worldwide headquartered in McLean, VA.  She was formerly Manger of Employee Benefits for FedEx Express and prior to that was the Manager of Strategic Planning & Governance, Retirement Plans for FedEx Corporation, both headquartered in Memphis, Tennessee.  She has more than 25 years’ experience in human resources and finance from both a plan sponsor and a TPA perspective, including qualified and non-qualified retirement and health and welfare benefits, training and communications.  Mary Nell holds both a Bachelor and a Master of Business Administration degree in accounting and finance from the University of Memphis.

She has served on various communication and education committees, legal and legislative committees, and has been the recipient of several PSCA Signature, Golden Quill, Telly and FedEx awards, including FedEx's highest honor, The Five Star Award for leadership.  Mary Nell has also written articles for various publications and presented at several PSCA, CEB, SOA, P&I and Wharton seminars and conferences on topics ranging from communications, retirement plan governance, to behavioral finance.  Mary Nell represented the employer viewpoint in the Society of Actuaries 2020 Retirement project as well as Living To Be 100 series.  She served a three-year term on the Department of Labor’s ERISA Advisory Council and was vice-chair for the Phased Retirement study in 2008 and Chair in 2010 for the Disparity in Retirement Security for Women and Minorities study.  She is currently on the Board for PSCA, on the Bloomberg BNA Pension & Benefits Publications Advisory Board, the T. Rowe Price Client Advisory Board, and the DCIIA Plan Sponsor Advisory Committee.  In 2012 she was elected and accepted into the National Academy of Social Insurance, a nonprofit, nonpartisan organization made up of the nation's leading experts on social insurance. She is the 2014 recipient of the nonpartisan Employee Benefit Research Institute (EBRI) Lillywhite Award which recognizes outstanding lifetime contributions to Americans’ economic security.

**George Bostick**

*Benefits Tax Counsel*

*U.S. Department of the Treasury*

George Bostick is the Benefits Tax Counsel at the U.S. Department of the Treasury. As Benefits Tax Counsel, George is responsible for advising the Assistant Secretary for Tax Policy, the General Counsel of the Treasury and others within Treasury in the formulation of the Administration’s employee benefits and executive compensation policy. He directs the activities of the attorneys, accountants, and actuaries who develop and review policy, legislation, regulations, and revenue rulings dealing with all aspects of employee benefits taxation and related matters.

Previously, Mr. Bostick was a partner at Sutherland Asbill & Brennan LLP. He is one of the founders of the firm’s Employee Benefits and Executive Compensation Team. He has worked in the area of employee benefits and executive compensation for his entire career. He focused primarily on executive compensation matters, compensation and benefit arrangements, cross-border benefits, and employee stock ownership and other equity compensation plans.

Mr. Bostick served from 1978 to 1980 as an Adjunct Professor of Law at Georgetown University Law Center. He is a graduate of the University of Virginia School of Law, where he served as Notes Editor of the V*irginia Law Review;* and Emory University, where he majored in economics.

**Joe Canary**

*Director, Office of Regulations and Interpretation,*

*Employee Benefits Security Administration, U.S. Department of Labor*

John J. Canary, known as “Joe,” is the Deputy Director of the Office of Regulations and Interpretations with the U.S. Department of Labor’s Employee Benefits Security Administration (EBSA).

EBSA’s Office of Regulations and Interpretations (ORI) is primarily responsible for carrying out EBSA’s regulatory agenda and interpretive activities under Title I of the ERISA, except for the group health plan provisions of Title I, which are handled by EBSA’s Office of Health Plan Standards and Compliance Assistance. The general interpretive and regulatory responsibilities of ORI are allocated on a subject matter basis between three divisions: the Division of Fiduciary Interpretations, the Division of Coverage, Reporting and Disclosure, and the Division of Regulations.

The office also plays a major role in the Department of Labor’s development, analysis and implementation of pension and welfare plan policy issues by providing technical assistance and support to the EBSA Assistant Secretary and other offices within EBSA. ORI also coordinates regulatory and interpretive activities under federal pension law with other Federal agencies such as the Department of the Treasury, the Internal Revenue Service and the Pension Benefit Guaranty Corporation.

Mr. Canary joined EBSA in 1996 as Chief of the Division of Coverage, Reporting and Disclosure. Before joining EBSA, Mr. Canary served as the Associate Deputy Solicitor in the Department’s Office of the Solicitor from 1991 through 1993, and as a Senior Trial Attorney in the Plan Benefits Security Division during 1993 and 1994. Mr. Canary also worked at the Investment Company Institute, the national association for the mutual fund industry, where he was Assistant Counsel for Pensions. He started his career in private practice with the law firm of Gibson, Dunn & Crutcher in its Los Angeles, California office from 1982 to 1986 and in its Washington, D.C. office from 1986 to 1990.

**Harry Conaway**

*Senior Partner*

*Mercer*

Harry Conaway heads Mercer’s Washington Resource Group, whose legal, technical, and research experts work with Mercer’s health and benefit, retirement, and talent businesses, and with other Marsh & McClennan operating companies, to develop intellectual capital and perform expert client work involving legal/technical advice, research, and/or innovative solutions.

Prior to joining Mercer in 1989, Conaway was Associate Tax Legislative Counsel in the Office of Tax Policy of the U.S. Treasury Department. While at Treasury, he worked on the retirement and health plan provisions of the Tax Reform Act of 1986, as well as the implementing regulations, and on other retirement and health plan legislation and regulations from 1983 through 1988.

Conaway is a graduate of Trinity College (BA, Hartford CT) and received an MA from the University of Pennsylvania and a JD from the George Washington University in Washington, DC. After law school, he was a tax associate at the Washington law firm of Miller & Chevalier (1980-1983). He was the 1990-1995 Chairman of the Flexible Benefits and Cafeteria Plan Subcommittee of the Employee Benefits Committee of the Tax Section of the American Bar Association, and from 1993-98, he was an Adjunct Professor of Law at the Georgetown University Law Center, teaching Tax Aspects of Employee Welfare Benefit Plans in the Graduate Tax Program. Conaway is currently on the Boards of The ERISA Industry Committee (ERIC), Employee Benefit Research Institute (EBRI), and American Benefits Council (ABC).

**Molly Conway**

*Labor and Pensions Counsel*

*U.S. Senate Committee on Health, Education, Labor, and Pensions*

Molly Conway is Labor and Pensions Counsel for Chairman Lamar Alexander (R-TN) of the Senate Committee on Health, Education, Labor, and Pensions (HELP). Molly has broad knowledge of federal labor and employment laws, the *Employee Retirement Income Security Act*, employer-related provisions of the *Patient Protection Affordable Care Act*, as well as significant legislative, regulatory, and oversight experience.

Prior to joining HELP, Molly worked for Chairman John Kline (R-MN) of the House Committee on Education and the Workforce for almost seven years. Most recently, Molly served as a Professional Staff Member, handling employment non-discrimination, health, and labor policy issues.  Before joining the committee, Molly was Senior Legislative Assistant in Representative Kline’s personal office. Molly also spent several years working on health policy issues in the private sector.

Molly received a B.A. in Political Science and Psychology from The George Washington University and a J.D. from American University Washington College of Law.

**Jeanne Denz**

*Director, Global Employee Benefits*

*General Mills, Inc.*

Jeanne Denz is Director, Global Employee Benefits for General Mills. In this capacity Ms. Denz is responsible for the design, cost, communication and administration of all employee benefits programs around the world. General Mills is recognized by Fortune as a great place to work which reflects the culture created by its overall workforce value proposition.

Ms. Denz has held positions in all areas of the benefits function. Ms. Denz is a trustee of the Council of Employee Benefits, a member of the Conference Board’s Research Council on Employee Benefits, Chair of ERIC, a charter member of BHCAG and a charter member of the National Drug Purchasing Coalition. Ms. Denz serves on the board of the University of Minnesota Medical Center. She is also a leading expert on pandemic influenza preparedness and in that capacity serves as the Associate Editor of CIDRAP Business Source Weekly Briefing at the University of Minnesota.

**Nora Eisenhower**

*Assistant Director for the Office of Older Americans*

*Consumer Financial Protection Bureau*

Nora Dowd Eisenhower joined the Consumer Financial Protection Bureau (CFPB) to serve as the Assistant Director of its Office of Financial Protection for Older Americans in August 2013.

The Dodd-Frank Wall Street Reform and Consumer Protection Act directs the CFPB to create an office within the agency to address the needs of older Americans, defined as those 62 and over.  The Office for Older Americans is dedicated to helping older consumers make sound financial decisions, protect their assets, and avoid financial abuse.

Prior to joining the CFPB, she served as the Senior Vice President of Economic Security and Director of the National Center for Benefits Outreach & Enrollment at the National Council on Aging. Her experience in working with older Americans also reaches to the state and private levels. Previously, Nora worked as Secretary of the Pennsylvania Department of Aging, where she managed an extensive statewide network of aging services. Prior to the Department of Aging, she served as Executive Director for AARP Pennsylvania. Earlier in her career, she fought health care fraud among Medicare beneficiaries at The Center of Advocacy for the Rights and Interests of the Elderly (CARIE) and also served as a Pennsylvania deputy attorney general in the Bureau of Consumer Protection. She began her legal career as a staff attorney at the Federal Trade Commission in Washington, D.C. where she targeted telemarketing fraud and other matters involving consumer fraud.

**Shad Fagerland**

*Attorney*

*IRS Office of Chief Counsel*

Shad Fagerland is an attorney with the IRS Office of Chief Counsel, Tax Exempt and Government Entities (TEGE). He specializes in health & welfare plans, including Internal Revenue Code section 4980H and the related reporting requirements. Shad was principal co-author of the final section 4980H regulations.

A graduate of the Yale Law School, Shad had twelve years of experience as an employee benefit attorney in private practice prior to joining the Office of Chief Counsel.

**Kara Getz**

*Tax Counsel*

*U.S. Senate Committee on Finance*

Kara Getz is Tax Counsel for the U.S. Senate Finance Committee under Chairman Ron Wyden (D-OR), where she works on taxation and pension issues.

Prior to joining the Finance Committee, Getz worked in the office of Congressman Richard Neal (D-MA) where she served as tax counsel and legislative director, advising the congressman on taxation, pension and budget issues. Prior to joining Congressman Neal’s office, Getz was Chief Counsel for the Senate Special Committee on Aging for former Chairman Herb Kohl (D-WI). Before that, she served as tax counsel for Senator Gordon Smith (R-OR) for almost four years.

Getz also has worked as the Director of Congressional Affairs for ASPPA and as a Senior Manager in the National Compensation and Benefits Group of Ernst & Young’s Human Capital practice.

**Pamela Grove**

*Sr. Director, Benefits and Vice President, Member Cooperative Health Plan*

*Land O’Lakes, Inc.*

As the Director of Benefits and HR Operations at Land O’Lakes, Inc., Pam has led the Fortune 200 Company through significant health care changes that have resulted in national industry recognition, political and media attention as well as speaking engagements. As a result of her leadership, the Company has realized more than $50 million in health care savings since 2004 through the strategic implementation of plan design changes, vendor management, wellness, and communications. In addition to the financial results, unprecedented participation in the Consumer Driven Health Plans was achieved (72% the first year - 83% in 2014) and significant employee health care behavior changes have been documented. This success has been highlighted by Watson Wyatt & the National Business Group on Health, Kiplinger’s Magazine, Wall Street Journal online edition and press releases distributed across the national news wires.

Prior to joining Land O’Lakes in 1999, Pam’s 20-year Human Resources experience includes roles as a U.S. Benefits Manager, HRIS & Benefits/Compensation Manager, and a Human Resources Generalist at several multi-national companies.

**Annette Guarisco Fildes**

*President & CEO*

*The ERISA Industry Committee*

Annette Guarisco Fildes is President and CEO of The ERISA Industry Committee (ERIC), where she has responsibility for the association's legislative, regulatory, and educational mission.  ERIC is the only national association advocating solely for the employee benefit and compensation interests of America’s largest employers.

Annette is a strategic public policy and political counselor with more than 30 years of government affairs experience involving complex legislative and regulatory matters in the U.S. and abroad.

Annette was a member of the senior executive team at General Motors performing key roles over more than ten years, including responsibility for federal legislative affairs and political and grassroots advocacy at the federal, state and international levels. Annette served as risk officer for GM Global Public Policy and advised the GM Board of Directors on global public policy.

Annette was also an executive with Honeywell International government affairs and served as counsel to Senate Majority Leaders Bob Dole and Trent Lott and at the law firm of Dewey Ballantine. She began her legal career at the Internal Revenue Service in the Office of Chief Counsel. Most recently, Annette was Executive Vice President, Public Affairs, for the Retail Industry Leaders Association, leading communications and government affairs efforts.

Annette has a B.B.A. in Finance and a law degree from Hofstra University, as well as a Masters of Law in Taxation from Georgetown University Law Center. She authored “Employer’s Guide to Fringe Benefits” with Mary B. Hevener and numerous articles in legal and policy publications.

**Garrett Hohimer**

*Senior Counsel-Legal Operations*

*Aon Hewitt*

Garrett Hohimer is a Senior Counsel in the Aon U.S. Law Department focused on regulatory and operational matters.  Prior to Aon he was with a boutique labor, employment, and benefits law firm in Chicago.

**Kevin Knopf**

*Attorney Advisor, Office of Tax Policy*

*U.S. Department of the Treasury*

Kevin Knopf has been an Attorney-Adviser in the Office of Tax Policy at the U.S. Department of the Treasury since 1987. He joined the Office of Benefits Tax Counsel within the Office of Tax Policy in 1992. His responsibilities include reviewing legislation and administrative guidance relating to employer-provided fringe benefits, health care, employment taxes and HIPAA, including guidance on HRAs and HSAs.

Mr. Knopf received a B.S. in Psychology in 1982 and a J.D. with distinction in 1985 from University of Iowa. He earned his LLM in taxation in 1988 from Georgetown University Law Center. He is a member of the Bar in Iowa and the District of Columbia.

**Michael Kreps**

*Senior Pensions & Employment Counsel*

*U.S. Senate Committee on Health, Education, Labor, and Pensions*

Michael Kreps serves as Senior Pension and Retirement Counsel for the U.S. Senate Committee on Health, Education, Labor, and Pensions where he advises Chairman Tom Harkin (D-IA) on matters related to retirement policy. Michael has primary staff responsibility for pension legislation pending before the Committee, including amendments to the Employee Retirement Income Security Act of 1974, and manages the Committee's oversight of retirement-related executive agencies.

Most recently, Michael was involved in the development of the funding stabilization and Pension Benefit Guaranty Corporation reform provisions of the MAP-21 Act of 2012. He also worked on the Pension Relief Act of 2010 and the pension investment provisions of the Dodd-Frank Wall Street Reform and Consumer Protection Act. Michael is actively helping Chairman Harkin develop proposals to expand access to the pension system and encourage innovative plan design.

Michael practiced law at the Groom Law Group in Washington, DC, before joining the HELP Committee staff. He advised employers, labor unions, plan trustees, and financial institutions on the fiduciary and prohibited transaction rules as well as plan funding, termination, and restructuring.

Michael holds a JD, with honors, from The George Washington University Law School and a BA, with distinction, in history and art history from the University of Colorado.

**Maria Krogue Christensen**

*Vice President for Product Development*

*Deseret Mutual Benefit Administrators*

Maria Krogue Christensen is the Vice President for Product Development at Deseret Mutual Benefit Administrators, a not-for-profit organization that administers employee medical, dental, wellness, life, disability, pension, and retirement savings plan benefits for a diverse group of affiliated organizations. She previously served in benefits administration at Brigham Young University.

Her more than 30 years of experience, both as a plan sponsor and as a plan administrator, have covered many facets of employee benefits management, including benefit design, marketing, client services, product development and implementation, and strategic planning. Maria received a B.A. degree from Brigham Young University.

**Elena Lynett**

*Office of Health Plan Standards and Compliance Assistance*

*Employee Benefits Security Administration*

*U.S. Department of Labor*

Elena Lynett is a senior health law specialist in the Office of Health Plan Standards and Compliance Assistance. Ms. Lynett participates in development of health plan regulations and other interpretive guidance under Title I of ERISA, including guidance related to the Patient Protection and Affordable Care Act (the Affordable Care Act) and the Mental Health Parity and Addiction Equity Act (MHPAEA). Ms. Lynett’s key role involves coordination of implementation activities with EBSA’s national and regional office representatives. In addition, Ms. Lynett serves as a DOL representative for the National Prevention Council and serves as a liaison between the Department of Labor and the National Association of Insurance Commissioners’.

**Janice Mays**

*Chief of Staff & Chief Counsel*

*House Ways and Means Committee*

Janice Mays is the Democratic Chief of Staff and Chief Counsel of the House Ways and Means Committee. She assumed her Chief Counsel position in 1993. From May 1987, she served as the Committee's Chief Tax Counsel and Staff Director for the Subcommittee on Select Revenue Measures.

Janice joined the Committee staff in 1975 after receiving her undergraduate degree (cum laude) from Wesleyan College in Macon, Georgia, and her Juris Doctorate (J.D.) from the University of Georgia College of Law. She also received her Masters of Law in Taxation from the University of Georgetown School of Law. Janice is admitted to practice in Georgia.

**Mark Mullet**
*Federal Tax Policy Director*

*Verizon*

Mark Mullet is the Federal Tax Policy Director for Verizon Communications Inc. responsible for policy setting and lobbying on Federal tax issues: a position he has held since 1995. In addition, Mark manages other Federal legislative issues that generally come under the CFO’s rubric including: pensions, executive compensation, insurance, accounting, securities and corporate governance.

Before joining Verizon, Mark served as Tax Counsel to former Senate Finance Committee Chairman Bill Roth (R-DE) and the Finance Subcommittee on Taxation. Previously, Mark was a Tax Manager in the Washington National Office of Touché Ross & Co. where he advised the firm’s global clients on legislative and regulatory tax issues. Prior to joining Touché, Mark served as Ways Means Committee Counsel to Congressman Hal Daub (R-NE). He began his professional career at the Touché Ross’ local office in Lincoln, NE in 1983.

Mark has a B.S. in Finance from the University of Nebraska, a J.D. from the University Of Nebraska College Of Law and an LL.M. in Taxation from Georgetown University School of Law. He is a member of the Nebraska State Bar, the American Bar Association, the Nebraska Society of Certified Public Accountants and the American Institute of Certified Public Accountants (AICPA). He has been an active member of the Federal Bar Association (FBA) and has served as the FBA’s Tax Section Chair.

Mark is married, has two daughters and lives in Northern Virginia.

**Senator Rob Portman (R-OH)**

*U.S. Senate*

Rob Portman is a United States Senator from the state of Ohio. He was elected in 2010, running a campaign that focused on commonsense conservative ideas to help create jobs and get the deficit under control. Rob won with a margin of 57 to 39 percent, winning 82 of Ohio's 88 counties.

Rob was born and raised in Cincinnati, where he lives today with his wife Jane, and their three children, Jed, Will and Sally. He grew up in a small business family, where he learned early on the value of hard work, leadership, and fiscal responsibility. When Rob was young, his dad, Bill Portman, borrowed money to start Portman Equipment Company, where Rob and his brother and sister all worked while growing up. His father, and then his brother, built the family business from a small forklift truck dealership with five employees, with Rob's mom as the bookkeeper, to one that employed more than 300 people. Rob became a lawyer and developed his own private practice, representing Portman Equipment Company and other small businesses. In 1993, Rob was a partner in the Cincinnati law firm of Graydon, Head and Ritchey when he was elected to Congress, where he represented the diverse, seven county Second District in southern Ohio. He was proud to serve the Second District for twelve years, and in seven elections, he never received less than seventy percent of the vote.

During his time representing the Second District, Rob earned a reputation as a serious leader who focused on results. Rob was actively involved in crafting and promoting the historic welfare reform efforts as a member of the committee that wrote the legislation, and he was a forceful advocate of the balanced budget that passed in 1997. Rob gained the respect of both Republican and Democratic colleagues through his successful, bipartisan legislative initiatives, including several measures he authored to increase retirement savings, reform the IRS and add over fifty new taxpayer rights, curb unfunded mandates, reduce taxes, and expand drug prevention and land conservation efforts.

In 2005, Rob left Congress when he was asked to serve as the United States Trade Representative, the Cabinet-level official responsible for implementing and enforcing U.S. trade policy. In his one year in the job, Rob was successful in reducing barriers to U.S. exports and increasing enforcement of trade laws to help level the playing field for American farmers, workers and service providers. Under his leadership, American exports increased and the U.S. brought successful legal challenges against international trade law violations.

Following his accomplishments as Trade Representative, Rob was asked to serve in another Cabinet post, this time as Director of the Office of Management and Budget. A deficit hawk, Rob made his mark by proposing a balanced budget, fighting irresponsible earmarks, and putting in place new transparency measures for all federal spending.

During his first term in the U.S. Senate, Rob authored the Senate Republican Jobs Plan, a seven-point agenda for creating jobs in Ohio and around the country through commonsense policies including tax reform, regulatory reform, and skills training. He has been a champion for underprivileged children, an advocate for policies that reduce poverty and increase opportunity, and a leader on expanding exports and American energy production. Rob has continued the work he began in the House of Representatives on drug abuse prevention and treatment and, through his efforts as part of the Senate Caucus to End Human Trafficking, he has played an important role in helping abused and exploited people around the world.

Portman is a member of the Finance Committee, Committee On Homeland Security And Governmental Affairs, Energy And Natural Resources Committee, and Committee On The Budget. He is also Chairman of the Permanent Subcommittee on Investigations.

**Martin Reiser**

*Legislative Counsel*

*House Majority Whip Steve Scalise*

Marty Reiser serves as Legislative Counsel for House Majority Whip Steve Scalise. In this role he focuses on healthcare, trade, tax and pension policy. Marty Reiser served as professional staff for the House Ways and Means Committee Health Subcommittee (Majority). In this role, he was responsible for health care issues impacting private insurance, employers, taxes and the economy.

Previously, he served as a manager of government policy for Xerox Corporation, and specialized in health, pension benefit and economic issues. In this role he chaired the National Coalition on Benefits, a leading coalition of 200 companies and trade associations formed to advocate for employer interests in health care reform.

He has also served as a Chief of Staff for Rep. Dan Miller (R-FL) and as Rep. Miller’s associate to the Budget Committee. He served as a staff member of the Minority leader’s Task Force on Health during the legislative debate over the Health Security Act (HillaryCare) and as lead staff for the Medicare Communications Group during the debate over the Balanced Budget Act of 1997. From 1999-2003, he served as Vice President of Public Policy for Citizens for a Sound Economy, a free-market think tank that focused on public policy issues impacting the economy.

Mr. Reiser began his career at the U.S. Department of Commerce. He holds a law degree from George Mason University and a Master’s in International Affairs from George Washington University. He earned a BA from Holy Cross.

**Preston Rutledge**

*Tax Counsel*

*U.S. Senate Committee on Finance*

Preston Rutledge is the Tax & Benefits Counsel at Senate Finance Committee. Prior to 2011, he previously was a Law Specialist at the Internal Revenue Service.

Rutledge received a LLM from Georgetown University Law Center, a J.D. from The George Washington University Law School, and a B.S. in business and finance from University of Idaho.

**Anthony Shelley**

*Member*

*Miller & Chevalier Chartered*

Anthony Shelley’s practice focuses on the litigation of pension benefits and health care issues before the federal and state trial and appellate courts and administrative agencies. Mr. Shelley’s experience includes the litigation of matters involving the Employee Retirement Income Security Act (ERISA) and other federal employee benefits statutes, such as the Federal Employees Health Benefits Act (FEHBA).

He has defended companies and plans in class actions and individual suits concerning challenges to benefits denials, exclusions from coverage, and subrogation and reimbursement matters. He has dealt frequently with issues of federal jurisdiction and the preemption of state law. Mr. Shelley’s experience also extends to disputes under the Medicare Act. He has argued before the U.S. Supreme Court and served as lead counsel in several important Circuit court cases.

Another aspect of Mr. Shelley’s practice focuses on protecting the rights of employees and retirees whose pension plans have failed and are now under the administration of, and subject to the insurance guarantees provided by, the Pension Benefit Guaranty Corporation (PBGC). Currently, he is representing a group of 1700 retired US Airways pilots in landmark litigation against the PBGC, in which they dispute the level of benefits determined for them by the PBGC upon the termination by US Airways (through bankruptcy) of its pension plan for pilots. In monetary terms and legal scope, the case is among the largest lawsuits ever brought against the PBGC.

Mr. Shelley is frequently quoted on timely issues and speaks regularly at national and industry conferences. Mr. Shelley has been published in a wide variety of business publications. Mr. Shelley received his J.D. from Harvard Law School in 1987 and a B.A. from Canisius College in 1984.

**Erik Sossa**

*Vice President, Global Benefits & Wellness*

*PepsiCo*

In his current role, Erik is responsible for the design, governance, administration and compliance of PepsiCo’s U.S. benefit programs as well as oversight of retirement design changes globally for PepsiCo.

He began his career at PepsiCo in 1996 and served various roles in the Compensation and Benefits groups at both PepsiCo and its affiliate, The Pepsi Bottling Group. In these roles he was responsible for the design, administration and financial management of Pepsi’s retirement, health & welfare and executive compensation programs.

Prior to coming to PepsiCo, Erik was a Consulting Actuary at Mercer Consulting. At Mercer he provided consulting serves for retirement and retiree medical programs regarding design and financial management.

Erik is an Enrolled Actuary under the Joint Board of Enrolled Actuaries and a member of the American Academy of Actuaries. He was a founding Board member of the Global Health Benefits Institute and the Institute on Obesity of the National Business Group on Health.

Erik is active in his community as a former Board member of the Clearpool Education Center and is a current Board Member of Green Chimneys. He serves as the current Chair of the Performance Improvement Committee at Green Chimneys.

He has a BS in Mathematics from Manhattan College. Erik lives in Yorktown Heights with his wife, Dee, and his two sons, Douglas and Timothy.

**Rich Stover**

*Principal and Consulting Actuary, Health and Productivity*

*Buck Consultants, Xerox*

Rich Stover is a Principal and Consulting Actuary in the Health and Productivity practice of Buck Consultants' Secaucus, New Jersey office. Rich has assisted clients in strategy, design, legislative compliance, and financial analysis for both active and retiree life and health programs. Rich has consulted extensively with employers on the health reform initiatives in San Francisco and Massachusetts, as well as reviewing the design, financial and administrative impact of federal health reform. He has also helped lead Buck’s health reform initiatives on a national level, including development of actuarial and compliance services for compliance.

Rich has more than 25 years of experience in the financial, plan design, and compliance aspects of group life and health benefits. Prior to joining Buck, Rich was the health and welfare practice leader of William M. Mercer's New Jersey office. He was also Vice President and Group Actuary Home Life Insurance, with responsibility for pricing, design, and managed care programs. He is frequently interviewed and quoted in general and business publications such as *Business Insurance, CFO, Kiplinger's Personal Finance, The New York Times, The Wall Street Journal,* and *USA Today*. Rich has also been interviewed for various radio and television programs such as CBS Evening News, CNN, and Dow Jones television. Additionally, he is a frequent speaker before various benefit and human resource groups on health and welfare topics such as wellness programs, HIPAA, non-discrimination requirements, mental health parity, GINA, and the state and federal health reform.

Rich earned a B.S. degree in Mathematics and Statistics from Stevens Institute of Technology. He is a Fellow of the Society of Actuaries and a member of the American Academy of Actuaries.

**Sally Welborn**

*Senior Vice President, Global Benefits*

*Wal-mart Stores, Inc.*

Sally is responsible for overseeing the global benefits programs for Walmart’s more than 2.2 million associates and their families in twenty-eight countries. With more than 30 years of experience, Sally has a deep perspective of the health care industry, an in-depth knowledge of retirement plan design and significant experience in managing total rewards programs.

Sally came to Walmart from Wells Fargo & Company where she was senior vice president, Corporate Benefits. During her tenure at Wells Fargo, Sally was responsible for the design and administration of all health and welfare and retirement programs for over 270,000 team members.

Prior to joining Wells Fargo, Sally’s career includes consulting with large employers in all areas of benefits strategy and health care optimization when she was with HCIA, Inc. and William M. Mercer, Inc. She also worked at Aetna as a relationship manager and at Union Bank as the Vice President of Benefits.

Sally is a graduate of the University of Texas at Arlington with a bachelor’s degree in mathematics. She earned the Certified Employee Benefit Specialist Designation through the International Foundation of Employee Benefit Plans and the Wharton School of the University of Pennsylvania. Sally currently serves in leadership positions at three employer benefits coalitions, the National Business Group on Health, the Pacific Business Group on Health and the ERISA Industry Committee.

**Michael Wise**

*Senior Corporate Counsel*

*Caterpillar Inc.*

Michael Wise is Caterpillar’s senior in-house employee benefits counsel, leading the Company’s Compensation and Benefits Practice Group within the Legal Services Division. He advises Caterpillar Inc. and its domestic subsidiaries regarding the design, documentation, implementation and administration of qualified and non-qualified retirement plans, welfare benefit plans and executive compensation programs. He also provides advice regarding all areas of compliance with the requirements of ERISA.

Before joining Caterpillar, Mr. Wise practiced exclusively in the area of employee benefits and executive compensation with a large law firm, where he represented diverse clients ranging from not-for-profits, professional corporations and closely held businesses to large, publicly traded corporations.