



The  
ERISA  
Industry  
Committee



## Speaker and Staff Biographies

### **Jane F. Greenman**

Vice President, Compensation, Benefits and Labor Relations  
Tyco International

Jane F. Greenman is Chair of The ERISA Industry Committee and Vice President, Compensation, Benefits and Labor Relations at Tyco International. In this role, she is responsible for development of global compensation and benefits programs and Labor Relations. Before joining Tyco in June 2003, she was Vice President and Deputy General Counsel, Human Resources at Honeywell International Inc. In this role, she led a department of over 15 legal professionals responsible for labor and employment law, litigation and compliance, employee benefits and compensation and HR and benefits aspects of corporate transactions. Ms. Greenman was also previously a partner and chair of the employee benefits department in the New York office of Hughes Hubbard & Reed. She is a graduate of Cornell University (N.Y.S.S.I.L.R.) and New York University School of Law, J.D.; L.L.M. - Labor Law.

Ms. Greenman has been on the faculties of New York University School of Law, Brooklyn Law School and at Hofstra Law School, teaching courses in employee benefits, pension rights and legal writing. She has testified before Congress She has written and lectured extensively about issues such as, retiree medical benefits, potential employer liabilities arising from managed care, employers' managed care and HMO contracting strategies, COBRA, employee and benefits issues arising in corporate transactions, HR legal issues in global M&A transactions, international benefits, labor and employment issues, benefit planning for both large and closely-held businesses, retirement plan aspects of estate planning, ethical issues in labor and employment and workplace harassment.

She is also an active member of ACCA and NJCCA and the Tax Section Employee Benefits Committee and Labor and Employment Committee of the American Bar Association. In 2000, she was elected to be a charter fellow of the American College of Employee Benefits Counsel.

Outside of work, Ms. Greenman is a member of the Board of the Women's Fund of New Jersey and is a member of the NJ 300. She has also been on the Board of "Playing it Safe", an organization dedicated to education about child safety issues. She has been active in Outward Bound of NYC and Ballet Hispanico. As an active member of her congregation, she and her husband established a "Scholar in Residence" Program that recently completed its fourth year.

**Paul Grundy MD, MPH, FACOEM, FACPM**  
Director, Healthcare Technology and Strategic Initiatives  
IBM Global Well Being Services & Health Benefits  
IBM Corporation

Paul Grundy is Chair of ERIC Health Policy Committee. Dr Grundy spent his early life in West Africa son of Quaker missionaries. He attend Medical School at the University of California San Francisco and did his Masters in Public Health at the University of California Berkeley. Dr. Grundy did his Residency training at Johns Hopkins in Preventive medicine with a focus in Occupational Medicine. He also did a post doctoral fellowship at Johns Hopkins in Occupational Health in the International Environment.

From 1997 to 2000 he was the Corporate Occupational Medical Director for International SOS the largest medical service company in the world providing and coordinating care, and medical assistance for multinational corporations.

From 1994 to 1997 Dr. Grundy was the Medical Director, Adventist Health Systems Pennsylvania the second largest-not-for-profit medical system operating in the state of Pennsylvania and the Medical Director for the largest occupational medicine program in Berks County, Pennsylvania.

From 1985 to 1994 he was a Regional Medical Officer and Counselor of Embassy for Medical Affairs, U.S. Department of State. In this role, Dr. Grundy was responsible for the diplomatic/ health interface and organizing such activities as the Clinton/Yeltsin health initiative a 157 million dollar bilateral initiative in Russia. In his role with the Department of State, he was responsible for advising the United States Ambassadors on health care programs for diplomatic posts. He set up the first U.S. policy and program addressing the HIV/AIDS epidemic in Africa. He worked to organize a Congressional fact-finding mission on the extent of the HIV/Aids problem and drafted the first bill in congress dealing with the HIV/Aids epidemic in Africa. Dr. Grundy finished his career in the Department of State as a Minister Counselor the highest rank for a doctor and the equivalent of a 3 star flag rank in the military.

From 1979 to 1985 Dr. Grundy was a medical officer in the U.S. Air Force where he taught at the School of Aerospace Medicine. He also served as a flight surgeon and Chief of Hospital services in Korea.

Dr Grundy has won numerous awards including Department of State Superior Honor Award for handling the crisis surrounding the two attempted coups in Russia, Department of State Superior Honor Award for work done in opening up all the new embassies after the fall of the Soviet Union, Department of State Superior Honor Award for work on the HIV/AIDS epidemic in Africa. He also won four Department of State Meritorious Service awards for outstanding performance in the Middle East and Africa. He received the Defense Superior Service award for outstanding service addressing HIV/Aids and The Defense Meritorious Service Medal.

**Michael L. Johnston**  
Retirement Practice Leader  
Hewitt Associates, LLC

Mike Johnston a member of ERIC's Executive Committee and is the Retirement Practice Leader for Hewitt Associates, LLC located in Lincolnshire, IL. In this role, Mike consults with a number of companies whose work is particularly focused in the areas of mergers and acquisitions and strategic plan design and funding decisions.

Mike received his BBA degree in Actuarial Science from the University of Wisconsin in Madison and has been with Hewitt Associates since his graduation.

Mike is a Fellow of the Society of Actuaries, a member of the American Academy of Actuaries and an Enrolled Actuary. Mike is also a member of the Executive Committee of The ERISA Industry Committee (ERIC) where he has been active in representing employer interests in defined benefit legislation proceedings.

**Scott J. Macey**  
Senior Vice President and Director of Government Affairs  
Aon Consulting

Scott J. Macey is a former Chair of The ERISA Industry Committee and is a senior vice president and director of Government Affairs in Aon Consulting's Tax and ERISA practice based in the Somerset, New Jersey office. His primary responsibilities include managing Aon's government affairs practice in Washington, DC as well as serving in a senior role regarding the client and project management and marketing of Aon services to new clients. Mr. Macey advises clients on ERISA, labor, tax, general corporate and related laws regarding the design, establishment, amendment and administration of employee and executive benefit plans and trusts. He also negotiates extensively with banks, insurance companies, investment advisors, and others providing service to or having a relationship with benefit plans or trusts.

Additionally, he meets regularly with such federal agencies as the Department of Labor, Internal Revenue Service and Pension Benefit Guaranty Corporation for discussions of current issues in the benefits field, and has testified before them, as well as before Congress on numerous occasions.

Mr. Macey has over 30 years of experience in compensation and benefit consulting in health care, pensions and executive compensation. On behalf of Mr. Macey's client corporations and their employees, he has spent a great deal of time in Washington focusing on health care, pension and related policy issues and meeting extensively with governmental representatives.

Mr. Macey has practiced in a large law firm, a corporate setting and a consulting firm environment. He was previously senior counsel to AT&T and the Bell System on benefit, ERISA, and related matters. Mr. Macey was Chairman of the ERISA Industry Committee (ERIC) from 1995 - 1998 and continues to serve as a member of the Executive Committee. He is also a member of the BNA Pension Advisory Board and serves on the editorial board of various professional journals and publications. Mr. Macey has published a number of articles in professional and business journals, is a frequent speaker at business and professional seminars and conferences, is quoted often in print media, and has appeared on business shows on television. Mr. Macey attended the University of California and the University of San Francisco and received a BA degree magna cum laude from the latter. He received his JD summa cum laude from the University of Santa Clara.

**Michael J. Stapley**  
President and Chief Executive Officer  
Deseret Mutual Insurance Company and Deseret Mutual Benefit Administrators

Michael J. Stapley is Chair of the Task Force on a New Benefit Platform. He is President and Chief Executive Officer of Deseret Mutual Insurance Company and Deseret Mutual Benefit Administrators (DMBA). He is also a trustee for Deseret Healthcare Employee Benefits Trust and for Deseret Mutual Employee Pension Trust. These companies collectively provide a broad range of benefits to The Church of Jesus Christ of Latter-day Saints and its affiliated organizations. These benefits include medical, dental, disability, life, pension, and savings plans. There are 37 employer clients and about 130,000 plan participants. DMBA also manages or monitors benefit plans in more than 75 different countries outside of the United States.

Previously, Michael served as the Acting Executive Director and Deputy Director of the Utah Department of Health where he worked extensively in the development of health care policy. Mr. Stapley also worked as Director of the Office of Management Planning in the Health Department and Director of Management Audit in the Utah State Department of Social Services. He also worked for a short period as a research assistant for U.S. Senator Wallace F. Bennett.

Mr. Stapley has served as a member of the Advisory Committee on Employee Welfare and Pension Plans, more commonly known as the ERISA Advisory Council, and during 2001 served as Chairman of that council. Established by Congress under the Employment Retirement Income Security Act (ERISA), the council provides advice to the Secretary of Labor on employee benefit issues. Currently Michael serves as a member of the Health Policy Committee, and Medicare Task Force for the ERISA Industry Committee (ERIC) and is a member of ERIC's Board of Directors. He also serves as chair of an ERIC Task Force consisting of representatives of General Motors, TYCO, Mobil/Exxon, Union Pacific, IT&T and others.

Mr. Stapley is the founder and Chairman of the Board of the Utah Health Information Network, which is one of the leading companies involved in electronic health care commerce in the United States. He also serves as vice-chairman of the Medical Education Council for the State of Utah that establishes policy for graduate medical education within the state. He is a member of the Scott Matheson Center for Health Care Studies at the University of Utah.

In the past Michael has served as Chairman of the Utah Health Access Steering Committee, as a member of the Utah Health Data Committee, and chairman of the Governor's Task Force on Catastrophic Health Expenses and the Governor's Task Force on Financial Barriers to Quality Health Care. He has also served as President of the Utah Health Insurance Association.

Over the past several years, Mr. Stapley has worked with the Reforming States Group sponsored by the Millbank Memorial Fund in New York City in implementing a variety of health related initiatives designed to help states more effectively deal with health care costs, quality, and access.

**Peter J. Tobiason**  
Assistant General Counsel  
ITT Corporation

Peter Tobiason is Vice Chair of ERIC and is Assistant General Counsel of ITT Corporation, an \$8B multinational engineering and manufacturing company with 40,000 employees worldwide. He directs compliance activities for employee benefit laws and regulations globally and manages all legal matters relating to employee benefit plans.

Peter is a leader at the national level on employee benefit policy, regulatory and legislative matters on behalf of major employers. He is Vice Chair of the ERISA Industry Committee (ERIC) and serves on the Executive Committee of its Board of Directors. He is past chair of ERIC's Retirement Security Committee.

Peter holds an A.B. from Columbia University and a J.D. from the University of Pennsylvania Law School. He is admitted to the Bar of the State of New York.

**Mark J. Ugoretz**  
President and CEO  
The ERISA Industry Committee

Mark J. Ugoretz has been President and CEO of The ERISA Industry Committee (ERIC) since 1983 and has overall responsibility for directing ERIC, its mission and its objectives. ERIC represents exclusively the employee benefits interests of America's major employers. ERIC's members provide comprehensive retirement, health care coverage and other economic security benefits directly to some 25 million active and retired workers and their families.

ERIC actively represents and advocates its members' interests on retirement security, health care coverage, taxation of employee benefits, federal preemption of state employee benefits legislation and other employee benefits and compensation issues. The association has a strong interest in and actively advocates proposals affecting its members' ability to deliver those benefits, their cost and effectiveness, as well as the role of those benefits in the American economy. ERIC also maintains a close working relationship with companies in the consulting, banking, insurance, and investment industries, many of which are members of ERIC.

ERIC also provides educational programs for its members, holds biweekly conference calls for its members (Washington Update and "FocusOn" calls) publishes electronically the weekly ERIC Executive Report, bulletins describing legislation and regulatory proposals and their effects on employee benefit plans, and maintains for its members and the public ERIC OnLine, an Internet site devoted to employee benefits issues.

Prior to joining ERIC in 1983, Mr. Ugoretz was assistant general counsel to the Nonprescription Drug Manufacturers Association (formerly The Proprietary Association) where he managed the organization's nationwide state legislative and regulatory interests, particularly in the area of federal preemption.

Mr. Ugoretz served both as Legislative Assistant and Chief of Staff to the late U.S. Rep. Dominick Daniels of New Jersey who, as Chairman of the House Manpower Subcommittee and the Subcommittee on Civil Service Retirement. Daniels was responsible for landmark legislation on employment training, worker safety, civil service retirement, and employment security and retirement legislation. Prior to joining Mr. Daniels' staff, Mr. Ugoretz was an attorney/advisor to the Chairman of the National Labor Relations Board.

Mr. Ugoretz is a graduate of the University of Wisconsin Law School. He did graduate work in industrial relations and received his undergraduate degree in political science from the University of Wisconsin.

**Edwina Rogers**  
Vice President, Health Policy  
The ERISA Industry Committee

Edwina Rogers currently serves as Vice President, Health Policy for The ERISA Industry Committee (ERIC) in Washington, DC. ERIC advocates the employee benefits and compensation interests of America's major employers. Until May 2004, Edwina was Counselor to Senator Jeff Sessions (R-AL). In this role, she handled matters for the Senator before the Senate Health, Education, Labor and Pensions Committee. Additionally, Ms. Rogers advised the Senator on Housing, Social Security and Welfare matters.

From January 2001 until November 2002, Ms. Rogers served as Associate Director for the National Economic Council (NEC) at the White House. Under President Bush, the NEC focused on the President's Agenda for Tax Relief, the National Energy Policy, Corporate Governance, Strengthening Social Security, Medicare Reform, Technology and Agriculture Policy, and other issues impacting the nation's economy. Ms. Rogers focused on tort, Social Security and Medicare reform. She was also responsible for External Affairs including media, public and business affairs; and NEC staff management. During 2000, Ms. Rogers served as Associate General Counsel to the U.S. Senate Sergeant at Arms, an appointment enabling her to develop the first detailed manual on policies and procedures for Senate Majority Leader Trent Lott (R-MS).

From 1996 to 2000, Ms. Rogers was a partner in the Washington office of the law firm Johnson, Rogers & Clifton, LLP. Her practice focused on general corporate law, business acquisitions, international law and government affairs. Ms. Rogers also practiced law in the Washington office of Balch and Bingham from 1991 until 1994, where she specialized in general legislative and regulatory law, campaign finance and election law, corporate and international trade law, banking law, and environmental and energy law. Ms. Rogers also served as the Executive Director of the Fair Government Foundation, an election reform nonprofit created by Senator Paul Coverdell (R-GA).

Ms. Rogers was a principal in the United States Managers Group LLC, which raised in 1997 and co-manages the private equity Taiwan Mezzanine fund along with Taiwan International Security Corporation of Taipei, Taiwan. She traveled extensively to and from Asia during 1997 and 1998 while serving as corporate counsel for Le Meilleur Co., Ltd., a trading and real estate development company in Seoul, South Korea.

Ms. Rogers received a B.S. in corporate finance from the University of Alabama and a J.D. from the Catholic University of America School of Law in Washington, D.C. She is a member of the Bars of the U.S. Supreme Court, the U.S. Court of International Trade, the U.S. Court of Appeals for the District of Columbia, the state of Pennsylvania and the District of Columbia. Ms. Rogers serves on the Board of Directors of Semco Energy, Inc. (NYSE: SEN) a natural gas distribution company. Edwina also serves on the Board of Trustees for the McLean Community Center (elected by tax district residents), McLean Citizen's Foundation, McLean Project for the Arts and McLean Orchestra. She is the author of numerous articles on business and policy.

**Rosemary Becchi**  
Vice President, Retirement Policy  
The ERISA Industry Committee

Rosemary Becchi is the Vice President, Retirement Policy for The ERISA Industry Committee (ERIC). ERIC represents exclusively the employee benefits interests of America's major employers. ERIC's members provide comprehensive retirement, health care coverage and other economic security benefits directly to some 25 million active and retired workers and their families.

Before joining ERIC in 2007 she was Vice President of Government Relations for Fidelity Investments, where she opened and managed the company's Federal Government Relations office. She represented Fidelity's interests before Congress and the Administration.

With more than a decade of public policy and government relations experience in the tax and benefits field, both in the private sector and in government, her experience includes work for the Internal Revenue Service, and as Tax Counsel to the Senate Finance Committee. She also worked at Arthur Anderson's Office of Federal Tax Services providing advice to corporate clients on a variety of issues as well as Citigroup's Federal Government Relations Division where she represented the company on corporate governance, accounting, and tax regulatory issues.

Rosemary earned her B.A.A. from the University of San Diego, a J.D. from Gonzaga University School of Law, and her L.L.M. in taxation from Georgetown University Law Center.

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**THE ERISA INDUSTRY COMMITTEE**

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