fi360 Conference

INSIGHTS

Speaker Biography

Dan Cassidy
FSA, EA, CFA
Managing Director - P-Solve Cassidy

With over 20 years working in financial services, Dan works to integrate cutting-edge approaches to risk management. After leading Cassidy Retirement Group for over fifteen years, Dan merged with P-Solve to form P-Solve Cassidy. Dan worked as a consulting actuary at Towers Perrin and Mercer before launching Cassidy Retirement Group. Dan also helped launch Hudson Pilot – a firm focused on innovation in the pension solutions area.

Dan authored A Manager's Guide to Strategic Retirement Plan Management published by Wiley in 2006. He was also a contributing author of Pension Actuary's Guide to Financial Economics published by the Society of Actuaries. Dan is also the Past General Chair of the Society of Actuaries Education System – working to educate the actuaries of the future. In 2010, he was elected to the Board of Directors of the Society of Actuaries – the largest actuarial organization in the world.

Dan has a Bachelor of Science in Mathematics from Tufts University. Dan’s professional designations include Fellow of the Society of Actuaries (FSA), Enrolled Actuary, Joint Board for the Enrollment of Actuaries (EA), Member, American Academy of Actuaries (MAAA), and Chartered Financial Analyst (CFA).

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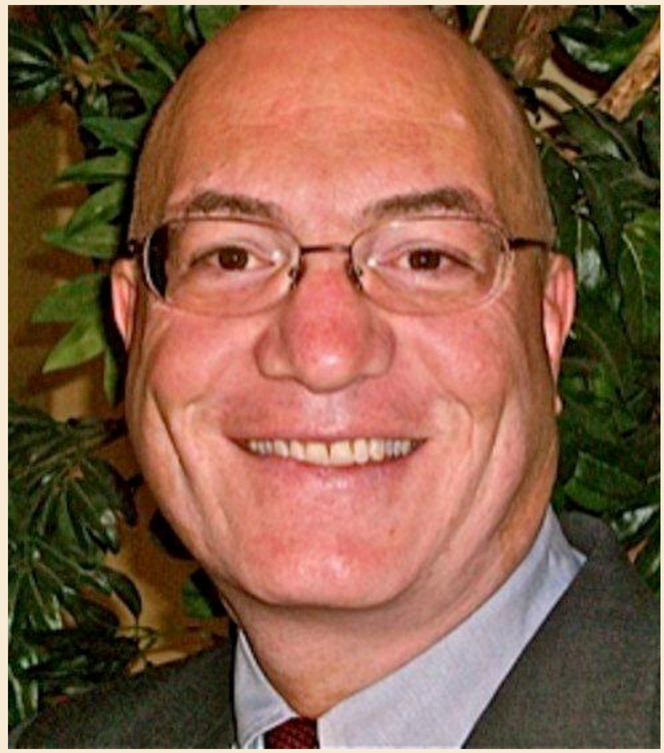

David Kershner
FSA, EA
Director, Consulting Actuary
P-Solve Cassidy

David has over 25 years of actuarial consulting experience, focusing on qualified and non-qualified defined benefit pension plans and retiree welfare plans. Helping large and medium-sized companies strategically manage the risks associated with their retirement plans, client projects have included multi-scenario forecasting of funding and expense levels, pension and retiree welfare plan valuations, plan design studies, merger & acquisition analysis, and union negotiation assistance.

Prior to joining P-Solve Cassidy, David was a Senior Consulting Actuary with Towers Watson. He has also been a Partner and Consulting Actuary with Ernst & Young, and an Associate Actuary with Milliman and Mercer.

David is a graduate of York University in Toronto, Canada. David's professional designations include Fellow of the Society of Actuaries (FSA), Enrolled Actuary, Joint Board for the Enrollment of Actuaries (EA), Member, American Academy of Actuaries (MAAA), and Fellow of the Conference of Consulting Actuaries (FCA).