OFFICERS

Joan Cleveland, Immediate Past Chair
President & CEO
SWBC Life Insurance Co.

Joan Cleveland leads SWBC Life Insurance Company, strategically identifying new markets and implementing innovative distribution methods and product offerings. She employs her Six Sigma analytical skills to drive process improvements to enhance the overall customer experience. As a skilled senior executive with more than 30 years of proven leadership and deep experience in the financial services industry, Joan is adept at leveraging her expertise and creativity to integrate products, distribution, and marketing plans for the benefit of the consumer, the customer, and the company.

Joan is a frequent industry speaker and media spokesperson. She is the Chair of LIMRA's Strategic Marketing Issues Committee, as well as Vice-Chair and President, Board of Directors of the Consumer Credit Industry Association. She is also a member of the Governing Board of Directors of Make-A-Wish of Central and South Texas..

Joan holds her Agent licenses for Life, Accident, and Health with appointments throughout all 50 states and has multiple FINRA securities licenses. She has a Bachelor of Science in Business Administration as well as the Chartered Life Underwriter®, Chartered Financial Consultant®, Registered Employee Benefits Consultant®, and Certified Long-Term Care Professional designations.

David Rose, Chair
Assistant Vice President-State Government Relations
MetLife

As an accomplished government relations attorney and lobbyist, David has over 25 years experience navigating legislative and regulatory matters at all levels of government. Prior to joining MetLife in 2018, David was a Partner at Wilson Elser and oversaw the Firm's

Government Relations practice in Connecticut for seven years, during which time he represented MetLife. David's government service includes four years as an Assistant Counsel to three New York State Governors, as well as five years serving as Senior Counsel to two Speakers of the Connecticut House of Representatives. At MetLife, David works on the State Government Relations team where he is responsible for legislative and regulatory matters impacting MetLife's products in Texas, as well as Connecticut, Georgia, Illinois, Michigan, Pennsylvania and Washington State, in addition to numerous other compliance jurisdictions.

Michael Hickey, Vice Chair
Regional Director
Aflac

Michael Hickey is a Regional Director for Aflac.

Ted G. Kennedy, Secretary
Vice President & Co-Head, US State Government Affairs
AIG

Ted Kennedy has over 31 years of experience in the financial services arena. Having served a term with Citicorp N.A., Mr. Kennedy is in his 29th year with American International Group, Inc. His office is in Austin, Texas where he holds the position of Vice President & Co-Head, US State Government Affairs. Mr. Kennedy manages the company's state level governmental affairs issues for the Western United States with a focus operationally on the company's life insurance and annuities lines. He participates in the drafting of legislation, provides expert testimony before legislative and regulatory committees, plans internal strategy and manages ongoing activity. He frequently represents the company before national associations where he regularly conducts educational seminars.

Mr. Kennedy holds a Bachelor of Business Administration in Finance from the University of Texas at Austin and a Doctor of Jurisprudence from South Texas College of Law. He is a member of the Association of Life Insurance Counsel and board member of the Texas Association of Life and Health Insurers, the Association of California Life and Health Insurance Companies and the Hawaii Insurance Council. In addition, Mr. Kennedy manages the company's guaranty association activity and is a member of the Board of Directors of the Texas,

New York, Florida, Georgia and Washington guaranty funds.

Michael Hickey is the Regional Director for Aflac.

Brent Thompson, Treasurer
Legal Counsel
Croy-Hall

Brent Thompson is Legal Counsel for Croy-Hall Management, Inc., near Fort Worth, Texas. Croy-Hall Management is a family-owned holding company that operates four small-size life and health insurance companies: Southwest Service Life Ins. Co. (stipulated premium); Regal Life of America Ins. Co. (legal reserve); Capitol Security Life Ins. Co. (stipulated premium); and United Assurance Life Ins. Co. (stipulated premium).

Brent graduated from Willamette University College of Law in Salem, Oregon, with a Doctor of Jurisprudence degree in 1992. After law school, he represented individuals and businesses in civil matters in his home town of Anchorage, helping make a nubbin of Alaska Supreme Court labor law precedent along the way. Desiring to live in a smaller land with more hot weather, Brent moved to Texas and was admitted to practice there in 1999. He joined Croy-Hall Management as its general counsel in 2013.

MEMBERS

Jason Broussard
Vice President, Compliance Life and Annuity
American National Insurance Company

Jason Broussard is the Vice President, Compliance Life and Annuity, Corporate Relations and Compliance, for American National Insurance Company in Galveston, Texas, where he is responsible for compliance initiatives relating to life insurance and annuity business.

Eric Dupont
Vice President, Government Affairs
The Guardian Life Insurance Company of America

Eric Dupont is the Vice President of Government Affairs at Guardian Life

Kari King
Director of Government Relations
USAA

Kari King is the Director of Government Relations with USAA Insurance. Her previous experience as General Counsel for the Texas House of Representatives Judiciary Committee provides insights into the state and makes her well versed for this critical role. Kari graduated from Southern Methodist University with a B.A. in Political Science and holds her Master's and Juris Doctorate from St. Mary's University School of Law.

Mohana Terry
Lead Director & Associate General Counsel, Law Department
Equitable

Mohana Terry is the Lead Director and Associate General Counsel in Equitable's Law Department.

Barry Koonce
Vice President, Chief Government Affairs Officer
American Fidelity

Barry Koonce is Vice President, Chief Government Affairs Officer for American Fidelity Corporation. A lifelong Oklahoman, Barry represents American Fidelity's interests before federal, state and local elected officials, regulatory bodies, governmental entities, trade associations and other organizations communicating American Fidelity positions that advance the interests of the company, its employees and customers. He has been with American Fidelity for over 22 years.

Barry represents American Fidelity on several national and state insurance industry boards, committees and working groups. Prior to joining American Fidelity, he served as an Assistant Attorney General for the State of Oklahoma, after serving as an Assistant General Counsel with the Oklahoma Department of Insurance. Barry is a graduate of the University of Oklahoma, where he earned both a BBA in Accounting and a Juris Doctor degree. He and his wife, Trish have 3 daughters and reside in Norman.

Dwayne McGraw
Chief Actuary
FDLIC

Dwayne McGraw serves as Chief Actuary for FDLIC, which is based in Texas. He has over twenty years of actuarial experience in the insurance industry and as an actuarial consultant to insurance companies. In his current role, Dwayne provides actuarial leadership for pricing, product development, implementation, in-force management and compliance accountabilities related all insurance products for Funeral Directors Life.

Dwayne is a Fellow of the Society of Actuaries and is member of the American Academy of Actuaries. He holds a B.S. in Mathematics from Virginia Tech, an M.S. in Mathematics from Northeastern University and returned to the Pamplin School for his MBA. Dwayne's research uses behavioral economics principles to examine how mortality salience influences consumer purchases of insurance products and how grief influences expenditures on funeral services.

Skip Braziel
Vice President, Government Affairs
Prudential

Skip Braziel is the Vice President of Government Affairs for Prudential. He has over 20 years of experience advocating, coalition building and problem solving at the local, state and federal levels.

Before joining Prudential, Skip served as Vice President of State Regulation and Legislation for the American Institute of CPAs (AICPA) in Washington, D.C. During his career, Skip has served as Assistant Vice President, State Government Relations for MetLife, Inc. in New York City and Washington, D.C., Vice President of State and Local Government Relations at LaSalle Bank Corporation in Chicago, Illinois, and Vice President & Community Relationship Officer at JPMorgan Chase in Chicago, Illinois.

Skip is a native of San Antonio, Texas and currently resides in Dallas, Texas with his wife, Erica Annise. He holds a B.A. in English from the University of Texas at Austin, an M.A. in History from the University of Texas at San Antonio, and a J.D. from Southern Methodist University School of Law.

April Beggs
Sr. Manager, Government Relations
Blue Cross Blue Shield of Texas

April Beggs is the Senior Manager of Government Relations at Blue Cross Blue Shield of Texas.

Gil Valdes
Governmental Affairs VP
New York Life

Gil Valdes serves as Governmental Affairs Vice President for New York Life. He is primarily responsible for monitoring and evaluating state legislative and regulatory proposals covering all life insurance, tax and market conduct issues in all 50 states. He has led NYL's Issues Management Process, a management tool used to establish the company's position and lobbying strategy on a wide range of legislative and regulatory issues. Externally, he has chaired both the Florida and Texas Life Insurance State Trade Associations and currently chairs several industry-wide substantive committees and task forces.

Prior to joining New York Life, Mr. Valdes was the Director of the Human Services Division for the New York City Council, the local legislative branch of government. In that role, he managed a staff of over 25 attorneys and policy analysts and acted as one of the Speaker's key advisors. He was primarily responsible for reviewing all legislation, legal documentation and oversight prepared by the Division's multiple legislative committees.

Mr. Valdes started his career with a private law firm, as a Litigation and Corporate Associate representing major Lain American banks and companies in the U.S. and abroad. In that role, he spent several years arguing a wide range of cases and motions in the Federal Court system.

Mark Williams
Senior Vice President - Investments and Compliance Officer
National Farm Life Insurance Company

Mark Williams is the Senior Vice President - Investments and Compliance Officer for National Farm Life. He has been with NFL for 16 years; prior to that he was a financial examiner with the Texas Department of Inurance. He has a BBA in Finance and an MBA from Tarleton State University.

Suzanne Loomis
Senior Vice President and Assistant General Counsel
Primerica

Suzanne Loomis is Senior Vice President and Assistant General Counsel with Primerica Life.

Kaj Samsom
AVP Deputy Chief Auditor and Director of Government Relations at National Life Group
National Life Group

Kaj Samsom is the AVP Deputy Chief Auditor and Director of Government Relations at National

Life Group.

Jim Marotta
Vice President, Chief Corporate Compliance Officer & Albany Site Leader
American National

Jim Marotta is the Vice President and Chief Corporate Compliance Officer of American National. He also serves as their Albany Site Leader