

# IUAN N. KELLY

## Consulting Actuary/Employee Benefits Administrator

An experienced health care and pension benefits actuary and administrator with a proven record for achieving cost savings through the use of penetrating analysis and benchmarking techniques thereby increasing revenues.

### Experience

#### **2011-Present**

##### **Actuary of the Future, Orinda, CA**

President- Consulting to FL employers and insurance brokers on health care reform compliance and Puerto Rico HMOs on IBNR; speaker for CA health advocacy groups

#### **1997-2011**

##### **Mahoney & Associates, Fort Lauderdale, FL**

Senior Actuarial Advisor- Proficient at performing actuarial attestations on all self funded and fully insured welfare plans including

- employer prescription drug plans seeking retiree drug subsidies;
- calculating and certifying IBNR liabilities and COBRA rates with 99.9% accuracy;
- preparing Forms 990, 1041, & 5500 and Summary Annual Reports;
- modeling and analyzing impact of consumer driven health care plan designs thereby reducing cost to clients

#### **1994-1997**

##### **Physician Corporation of America, Miami, FL**

Corporate Actuary- Coordinated rate certifications and filings for life, disability, and managed care, health insurance, managed care workers' compensation and 24 hour product rate filings in Alabama, Florida, Georgia, Puerto Rico, and Texas including

- Florida HMO revenue requirements for commercial and Medicare Adjusted Community Rate products based on regional incidence and net cost, weighted capitation rates, cost trending, administrative expense analysis, and reinsurance. Developed primary and specialty care capitation rates on age/sex basis using population utilization weightings;
- Assisting in preparation of Life, A&H, and P&C Annual Statements;
- Interviewed and briefed marketing and support staffs on product rollout schedules.

#### **1992-1993**

##### **The Leslie Fay Companies, Inc., Wilkes-Barre, PA**

Director of Benefits-Responsible for cost effective, fair and timely administration of employee benefit program

- Cafeteria plan, 401(k) plan and cash balance plan having a combined \$9.5 million annual budget;
- Managed staff of three administrators to enroll participants, oversee funding and investments, and authorize payments.
- Healthcare and dependent care spending accounts and expatriate benefits

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<b>1990-1992</b>	<b>Alexander &amp; Alexander Consulting Group, Inc., Atlanta, GA</b> <u>Consulting Actuary</u>
<b>1986-1990</b>	<b>KPMG Peat Marwick, Rochester, NY</b> <u>Senior Manager</u>
<b>1978-1986</b>	<b>Houdaille Industries, Inc., Fort Lauderdale, FL</b> <u>Director of Retirement Plans and Actuary</u>
<b>1973-1978</b>	<b>William M. Mercer, Inc., Boston, MA</b> <u>Employee Benefit Plan Consultant</u>
<b>1969-1973</b>	<b>Coates, Herfurth &amp; England, San Francisco, CA</b> <u>Employee Benefit Plan Consultant</u>

### **Education**

M.S. Actuarial Science, Northeastern University, Boston, MA  
M.A. Statistics, University of California, Berkeley, CA  
B.A. Mathematics, University of California, Santa Barbara, CA

### **Certifications**

Member American Academy of Actuaries

### **Military**

Honorable Discharge received 1967  
Top Secret Security clearance (inactive)  
Graduate, US Army Command & General Staff College 1980  
Lieutenant Colonel, USAR (Ret) 1993

### **Publications/Presentations**

Adjunct Professor, University of Miami 1996-2012 and Keiser University 2011-2012  
Deductibility of Incurred But Unreported Liabilities, Contingencies Magazine, November 2010  
Controlling Self Funded Health Costs, 28<sup>th</sup> International Congress of Actuaries 2006, Paris, France  
PBGC Form 1, 1988 Enrolled Actuaries Meeting, Washington, D.C.  
FASB 35, 1985 Spring Society of Actuaries Meeting, Hollywood, FL  
PERISA or Perish, Funding Public Pensions, Mercer Bulletin, February 1977