

April 20, 2010 Portland Actuarial Club Luncheon

Title: *Providing Expert Testimony*
Speaker: *Roger Arockiam, FSA, EA, MAAA*
Scott Fitzpatrick, FSA, MAAA
Susan Pierce, FSA, MAAA

When: Tuesday April 20, 2010 at 12:00 noon
Where: Heathman Hotel – Broadway Room
1001 SW Broadway
Portland, OR 97205

RSVP: Please RSVP by **April 15th at 10:00 am** at our new website:
www.PortlandActuarialClub.org/
RSVPs received later than the deadline will incur an additional \$5 fee.

Providing Expert Testimony

The possibility of being asked to provide expert testimony is unsettling for many actuaries. We will be holding a panel discussion with three panelists who will share their experiences and advice regarding providing expert testimony relating to their role as an actuary. The panelists will discuss information such as:

- What were the circumstances that resulted in you being required to testify?
- How did you prepare?
- How did the actual experience of providing testimony go?
- How did you protect yourself and your company?
- What would you have done differently?
- How can we minimize the risk of having to testify?
- What can we do to minimize our legal exposure if we are required to testify?
- What other sage advice can you share?

There will be a question and answer session at the conclusion of their remarks.

Given the numerous professionalism issues involved when serving as an expert witness, this presentation may count toward professionalism credit at the discretion of attendees.

About the Speakers

Susan E. Pierce

Susan E. Pierce, FSA, MAAA is the Medicare Actuary for Regence Blue Cross Blue Shield in Portland Oregon. She came to Regence last summer after almost 15 years at Blue Cross Blue Shield of Massachusetts. Massachusetts requires public rate hearings for Medicare Supplement rate increases that are over 10% and Sue testified as the expert actuarial witness for BCBSMA.

Sue has over 30 years of actuarial experience, mostly in health insurance. She holds a BA from Bates College in Maine. After being a Maine resident for 20 years, Sue is enjoying living in “the other” Portland. Yes, she did commute from Maine to Boston for many years.

Scott L. Fitzpatrick

Scott L. Fitzpatrick, FSA, MAAA holds a Bachelor of Science from the U. S. Naval Academy. He has eighteen years Insurance Industry experience in the Group Life and Health field and also fixed income annuities. He recently celebrated his third anniversary as a regulator with the Oregon Insurance Division.

In the mid-1990's, during the Flexible Examination System (FES) "Magical Mystery Tour **," he took an odd risk and sat for "The Actuary as Expert Witness. Little did he know at the time how much of a harbinger this escapade would be.

He spent four and a half hours on the witness stand in a Contested Case Hearing on February 4th, 2009.

Roger Arockiam

Mr. Arockiam is a Consulting Actuary and Team Leader in the Defined Benefit Services group of Standard Retirement Services, Inc. He specializes in the design, funding, termination, financial accounting, communication, and administration of a variety of qualified and non-qualified retirement, post-retiree health care, and fringe benefit plans. He serves a broad range of publicly traded, privately held, and governmental clients.