Robert L. Staffier, FSA

Main: 503.670.7772

EXPERIENCE

Thomas Brady and Associates, Boston, MA, *Regional Vice President,* 2017-Present

- Insurance reviews, Estate Planning and Wealth Transfer

Metropolitan Life Insurance Company, Boston, MA, *Vice President, Americas Actuarial Finance,* 2015-2016

- Lead MetLife's Embedded Value accounting initiative for all US based businesses
- Provide subject matter expertise and guidance related to Embedded Value.
- Project Management of 2014 and 2015 Embedded Value process, including setting timeline, dependencies and deliverables as well as managing to plan and budget.
- Design short term and long term process flows and work with Information Technologies to automate as appropriate.

Metropolitan Life Insurance Company, Boston, MA, *Vice President, Retail Life Product Development,* 2007-2014

- Lead MetLife's Retail Life Product Development Group with responsibilities including development of life insurance product strategy; design and development of new life insurance products; creation of sales illustrations and concepts; and product training of sales personnel and producers.
- Work closely with Distribution, Information Technologies, Legal, Corporate Actuarial and Marketing to bring products and enhancements to market in a timely and efficient manner.
- Implement new Policy Administration and Illustration systems to provide consistency of product design, improve speed to market and reduce development costs.
- Manage, coach and develop a diverse group of associates located in multiple geographic sites in a dynamic, team-oriented organization.

Metropolitan Life Insurance Company, Boston, MA, *Vice President, Individual Product Management,* 2002-2007

- Managed a unit responsible for all aspects of life insurance product management and development for MetLife Investors' independent distribution channel.
- Served as Life Insurance product lead for Travelers acquisition and integration, responsible for due diligence, staffing decisions, product, and policy consolidation.
- Managed MetLife's competitive intelligence group. This area researches and analyzes competitive life insurance and annuity products and provides product expertise and training materials to sales units as well as product development areas.
- Served as technical and product expert for sales managers, wholesalers and other sales consultants.

New England Financial, Boston, MA, *Second Vice President, Individual Product Management,* 2000-2002

- Product Manager for all New England Financial brand life insurance products, including variable, universal, traditional and term.

- Managed a staff of four responsible for the design, development and implementation of life products, associated marketing materials and sales illustrations.
- Instrumental in the strategic development and implementation of New England Financial's entrance into the COLI marketplace.
- Responsible for product training of home office and field associates.
- Provided sales support to the New England Financial agency force.

New England Financial, Boston, MA, *Assistant Vice President, Individual Product Management,* 1995-2000

- Assistant Product Manager for variable and universal Life products, responsible for the design, development and implementation of new products, associated marketing materials and sales illustrations. Involved in product training for home office and field associates. These two product lines accounted for over 80% of life insurance sales for the company.

New England Financial, Boston, MA, *Assistant Actuary, Actuarial Product Development,* 1993-1995

- Pricing actuary for universal life and specialty products. Responsibilities included product design and development, state filings, financial reporting, reserve valuations and cash flow testing for the universal life product line.

New England Financial, Boston, MA, *Actuarial Associate, Actuarial Financial Reporting,* 1991-1993

- Responsible for financial reporting and projections on a statutory, MGAAP and tax basis, as well as cash flow testing, risk based capital allocation and asset/liability matching for the individual life insurance product line.

New England Financial, Boston, MA, *Actuarial Associate, Actuarial Analysis and Support,* 1989-1991

- Responsible for the development of the annual dividend scale for traditional life product line, including profit, expense, and investment assumptions. Extensive analysis of investment experience of policyholders required in developing portfolio and block of business interest assumptions.
- Provided analysis and case support to field agents and marketing department.

New England Financial, Boston, MA, *Actuarial Assistant, Group Life and Health Actuarial,* 1987-1989

- Responsible for financial reporting and projections for the Group Long Term Disability product.
- Actuarial liaison to underwriting and agency divisions.

EDUCATION

Tufts University, Medford, MA, *B.S. Mathematics,* Magna Cum Laude
Tufts University, Medford, MA, *B.S. Computer Science,* Magna Cum Laude

LICENSES

FINRA, Series 7 and 24