

John H. Moore

Professional Biography and Qualifications

John H. Moore, FSA, MAAA, FCA, EA
COO and Chief Actuary
The Terry Group
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Education

Bachelor of Science in Applied Mathematics, University of Colorado – Boulder, 1991

Professional Experience

The Terry Group, 2012 to present

- Chief Operating Officer and Chief Actuary

Aon Hewitt, 2010 to 2012

- Via acquisition of J.P. Morgan Compensation and Benefits Strategies
- International actuarial and employee benefits consulting firm
- Senior Vice President and Chief Actuary for U.S. retirement practice

J.P. Morgan Compensation and Benefit Strategies, 2006 to 2010

- Via acquisition of CCA Strategies LLC
- Managing Director and Chief Actuary

CCA Strategies LLC, 2000 to 2006

- Firm of over 200 professionals with offices in Atlanta, Boston, Chicago, Dallas, Denver, Jacksonville, Los Angeles, New York, San Francisco, and St. Louis
- Principal and Chief Actuary

Towers Perrin, 1991 to 2000

- International actuarial and employee benefits consulting firm
- Senior Actuary of Denver office; transferred from Houston office in 1996
- Representative on firm's Benefit Actuarial Practice Committee

Professional Memberships

Fellow of the Conference of Consulting Actuaries, 2003 to present

Fellow of the Society of Actuaries, 1997 to present

Member of the American Academy of Actuaries, 1996 to present

Enrolled Actuary under ERISA, 1995 to present

Professional Involvement

U.S. Department of Defense Board of Actuaries

- Board member, appointed 2015 to 15-year term

Conference of Consulting Actuaries

- Disciplinary review panel, 2018 (chair)
- Professionalism Committee, 2017 to present

American Academy of Actuaries

- Secretary-Treasurer, 2015 to 2016
- Secretary, 2013 to 2015
- Disciplinary review panel, 2012 and 2014 (chair)
- Vice President for Pensions, 2011 to 2013
- Pension Practice Council, 2009 to 2013
- Chair, 2011 to 2013
- Committee on Professional Responsibility, 2008 to 2011
- Tax Reform Work Group, 2007 to 2009
- Pension Committee, 2002 to 2011
- Chair, 2009 to 2011

Enrolled Actuaries Annual Meeting

- DOL Green Book Committee, 2006 to 2016
- IRS Gray Book Committee, 2004 to 2016
- PBGC Blue Book Committee, 2004 to 2016

Practitioners' groups

- Funding Reform Advisory Task Force, 2006 to 2008
- Participant in monthly meeting of major actuarial firms' research actuaries, 2002 to present

Speeches and Panels

2018 Professional Standards Seminar

Enrolled Actuaries Annual Meeting, 2018

2017 Professional Standards Seminar

Enrolled Actuaries Annual Meeting, 2017

2016 Professional Standards Seminar

Enrolled Actuaries Annual Meeting, 2016

ERISA Fiduciary Responsibility - It's a Matter of Trust

Enrolled Actuaries Annual Meeting, 2016

Professional Standards/Ethical Dilemmas Seminar

Enrolled Actuaries Annual Meeting, 2015

More Ethics

Enrolled Actuaries Annual Meeting, 2014

Pension Insurance – How Should It Work

Enrolled Actuaries Annual Meeting, 2014

ASOPs 4, 6, and 27 (and 35)

Conference of Consulting Actuaries Annual Meeting, 2013

Dialogue with the Academy Pension Practice Council Leaders

Enrolled Actuaries Annual Meeting, 2013

Dialogue with the IRS

Conference of Consulting Actuaries Annual Meeting, 2012

Late Breaking Developments

Enrolled Actuaries Annual Meeting, 2012

Hybrid Regulations for Plans Large and Small

Conference of Consulting Actuaries Annual Meeting, 2011

New Regulations for Enrolled Actuaries

Conference of Consulting Actuaries audiocast, 2011

Late Breaking Developments

Enrolled Actuaries Annual Meeting, 2011

Application of Precept 13 of the Code of Professional Conduct

American Academy of Actuaries webcast, 2009

An Overview of New IRS Regulations – Sections 430 and 436 – Update from Leading Pension Actuaries – Part 2

Conference of Consulting Actuaries audiocast, 2009

PPA – A Look Forward (for Large Plans)

Conference of Consulting Actuaries audiocast, 2009

PPA Reports – Only the Facts or Something Useful?

Enrolled Actuaries Annual Meeting, 2009

PPA – Please Provide Advice!

Conference of Consulting Actuaries Annual Meeting, 2008

New and Improved – ASOPs for Pension Actuaries

Conference of Consulting Actuaries audiocast, 2008

Hybrid Plans and Variable Design Workshop

Enrolled Actuaries Annual Meeting, 2008

Age Discrimination in Defined Benefit Plans

Enrolled Actuaries Annual Meeting, 2007

Do the Right Thing

Conference of Consulting Actuaries Annual Meeting, 2006

Circular Logic

Conference of Consulting Actuaries Annual Meeting, 2006

IRS Circular 230 Webcast: It's Not Just About the Warning Statement. What Every Enrolled Actuary Needs to Know

Society of Actuaries webcast, 2006

Circular 230, Listed Transactions and Reportable Transactions

Enrolled Actuaries Annual Meeting, 2006

Application of Relative Value and RASD - Implementation Issues

Enrolled Actuaries Annual Meeting, 2005

Relative Value Regulations – What Now?

Society of Actuaries webcast, 2004

Benefit Accrual Rules – Accrual and Unusual Punishment

Enrolled Actuaries Annual Meeting, 2004

Pension Plans – Innovative Designs Meet Old School Accrual Rules

Conference of Consulting Actuaries Annual Meeting, 2003

An Introduction to Cash Balance Plans

National Association of Regulatory Commissioners, 2002

Articles and Other Media

Brief of Chief Actuaries as Amici Curiae, Conkright v. Frommert

- Participant in amicus brief to the U.S. Supreme Court, 2009

Living with the Cash Balance Burden: Time to Act?

- Journal of Pension Benefits, 2006

Contributing author on various articles on CCA Strategies' Insight website, including:

- *CCA Strategies Offers Compelling Compromise for FASB Consideration*
- *IRS Acknowledges Delay in Finalizing Relative Value Regulations*
- *Heinz, Rev. Proc. 2005-23 and Suspension of Benefits*
- *Retroactive Annuity Starting Date Rules*
- *Sorting Out the Relative Value Guidance*

Expert Testimony

In 2016 and 2017, Mr. Moore prepared a report and was deposed as an expert in *Walid Jammal, et al. v. American Family Insurance Company, et al.* in the U.S. District Court for the Northern District of Ohio. The case involves a dispute over the status of insurance agents (as contractors or employees) and the resulting employee benefit/pension implications. The case is in the appeal process.

Mr. Moore has served as a consulting expert in numerous confidential pension litigation assignments involving actuarial malpractice, merger and acquisition transactions, plan administration and interpretation, and labor union arbitration.

Civic Involvement

Budget Advisory Committee, Englewood, Colorado

- City council appointee, 2014 to 2016

Adopt-A-Garden, Romans Park, Englewood, Colorado

- Volunteer, 2010 to present

Non-Emergency Employees Retirement Board, Englewood, Colorado

- City council appointee, 2009 to present
- City council liaison, 2001 to 2009

Water and Sewer Board, Englewood, Colorado

- City council appointee, 2009 to present
- City council liaison, 2001 to 2009

City Council, Englewood, Colorado

- Mayor Pro-Tem, 2007 to 2009
- Council member, re-elected 2005
- Council member, elected 2001