

# Kentucky Captive Association 2018 Educational Conference Speaker Biographies



## **Eric H. Anderson, FCAS, MAAA, Actuary, GPW and Associates, Inc.**

Following his graduation from ASU in June 2008, Eric joined GPW and Associates, Inc. as an Actuarial Analyst. Following his attainment of Fellowship in the Casualty Actuarial Society in 2015, he was promoted to Actuary. Mr. Anderson's responsibilities include reserving and pricing focusing on commercial lines, reinsurance and captive insurance. Fields of expertise include developing and pricing enterprise risk captive insurance programs for various types of clients. also has expertise with various Finance and Insurance (F&I) products including vehicle service contracts, guaranteed asset protection, tire and wheel and other ancillary programs within the F&I space.



## **George M. Belokas, FCAS, MAAA, Vice President and Actuary, GPW and Associates, Inc.**

In 2006, George joined GPW and Associates, Inc., an actuarial and consulting firm founded in 1998, as an actuarial analyst. He was promoted to actuary in 2011 following his completion of the exams required for Fellowship in the Casualty Actuarial Society. George's experience includes reserving and pricing, with a focus in Finance and Insurance products, captive insurance, reinsurance and commercial lines. Fields of experience include vehicle service contracts, guaranteed asset protection, tire and wheel, ancillary Finance and Insurance products, workers' compensation, property and automobile liability.



## **Russell R. Coy II, Captive Coordinator, Kentucky Department of Insurance**

Russ has served as the captive coordinator for Kentucky since 2006. He is responsible for market development, licensing, and regulation of captive insurers. He worked for the Department's Legal Division from 1995 to 2006 where his practice specialized in corporate law, administrative law, financial solvency regulation, insurance rate intervention, and insurer rehabilitation/liquidation law. He served as legislative counsel for the 1998 and 2000 sessions of the General Assembly. Russ holds a J.D. from the University of Kentucky-College of Law and a B.A. in Finance from Transylvania University. He is a native of Richmond, Kentucky.



## **Shawn L. Fishbaugh, CFA®, Chief Investment Officer, John D. Dovich & Associates, LLC**

As Chief Investment Officer, Shawn is chairman of the firm's Investment Committee and is responsible for coordinating the firm's investment strategies with the team of principals. Shawn collaborates with the team to understand client investment objectives and goals to assist in structuring investment plans that meet those needs. Shawn joined the firm in 2013 with a robust history of experience at several area wealth management companies, working in roles such as senior investment advisor, senior portfolio manager, research analyst and portfolio manager. Shawn earned his BBA in Finance from the University of Cincinnati in 1986 and received his CFA designation in 1990. Shawn is a member of the CFA Institute and the CFA Society of Cincinnati.



## **KY Representative Adam Koenig**

Adam Koenig was elected to the Kentucky State House of Representatives in November 2006. He is Chairman of the Licensing, Occupations and Administrative Regulations committee, and serves on the Banking and Insurance, Local Government, and Economic Development and Workforce Development Committees. In addition, Adam serves on the Program Review and Investigation Committee. Prior to his election, he served eight years as Kenton County Commissioner and three years as Villa Hills City Councilman. In addition to being a State Representative, Adam is a realtor with Coldwell Banker West Shell.



**Thomas J. Lalley, CFA®, CFP®, MBA, Principal, John D. Dovich & Associates, LLC**

Tom is responsible for developing wealth strategies for the firm’s clients in addition to assisting them with their investment decisions. Tom monitors client portfolios, tracks performance, renders investment recommendations and helps individuals define and achieve their estate and financial objectives. Tom is a Xavier University grad, where he earned his MBA with honors in 1999. Tom joined John D. Dovich & Associates in 2000 and acquired his Certified Financial Planner™ (CFP®) designation in 2002. He is a member of Financial Planning Association (FPA) and CFA Society of Cincinnati. He has successfully completed the Chartered Financial Analyst (CFA) program and is one of a small percentage of individuals world-wide that hold both the CFP® certificate and the CFA charter.



**Charles J. (Chaz) Lavelle, Senior Partner, Bingham Greenbaum Doll, LLP**

Chaz is an attorney in the Louisville, Kentucky office of Bingham Greenebaum Doll LLP, and is listed in both Captive Review’s Power 50 and ERC 20 Pioneers. He was Tax Counsel for two taxpayer victories in captive insurance tax cases in the United States Court of Appeals: Humana (deciding the “brother-sister” issue) and Ocean Drilling (deciding the outside business issue). He has been listed in Best Lawyers for over 20 years and was named Louisville Best Lawyer – Tax or Louisville Best Lawyer – Controversy and Litigation several times. Chaz co-teaches at ICCIE and regularly lectures and writes on captives. His civic and charitable activities include having served as Chair of the Kentucky Chamber of Commerce.



**Robert J. Ramsay, CPA, CISA, CITP, HITRUST CCSFP, Director, Barnes Dennig**

Robert leads the Risk Management practice, offering Service Organization Controls (SOC) and data security services. He has performed technology consulting and audit services for more than 15 years, helping organizations of various sizes and types strengthen their internal controls. He is a frequent presenter for the AICPA and ISACA, and has served on many local boards of directors, including currently as president of the Cincinnati Chapter of ISACA. Prior to joining Barnes Dennig, he managed an Information Systems Risk Management practice for an international CPA firm



**Kristen Schlotman, Executive Director, Film Cincinnati (aka the Greater Cincinnati and Northern Kentucky Film Commission)**

Kristen joined the commission in 1997 and has since been involved with organizing, planning and helping Hollywood film companies navigate the tri-state area. Films titles including The Ides of March, Carol, Gotti, Killing of a Sacred Deer, Goat, The Public, Secretariat, Sea Biscuit, Miles Ahead, have all benefited from Kristen’s work and her dedication to promote filming in our area. Kristen serves movies and productions from beginning of development through distribution. Her efforts have helped put Cincinnati on the global stage, as we have recently seen many of our local productions premiere at the Cannes, Venice, Sundance and Toronto international films festivals.



**Ryan C. Work, Vice President, Government Affairs, Self-Insurance Institute of America, Inc.**

Ryan currently serves as the vice president of government affairs for the Self-Insurance Institute of America, Inc. (SIIA) where he heads up the association’s federal legislative advocacy and political activities. In this role, Ryan is responsible for developing and managing strategic outreach and policy development before Congress, the Administration and various federal regulatory agencies. Prior to joining SIIA, Ryan managed government affairs activities for McGraw Hill Financial (MHFI)/ Standard & Poor’s (S&P), and served in a number of senior staff positions within the U.S. House of Representatives, most recently as Legislative Director for Republican Conference Chair Cathy McMorris-Rodgers (WA). He previously served as Chief of Staff to Rep. Katherine Harris (FL) and in various staff roles with the Committee on Ways and Means and the Office of the Speaker of the House, J. Dennis Hastert (IL).