

Jan 28, 2010 Portland Actuarial Club Luncheon

Title: *Approaches for Promoting Voluntary Annuitization*

Speaker: Beverly J. Orth, JD, FSA

When: Thursday Jan 21, 2010 at 12:00 noon

Where: Heathman Hotel
1001 SW Broadway
Portland, OR 97205

RSVP: Please RSVP by **Jan 25th 10:00** at our new website:

www.portlandactuarialclub.org/contact/rsvp/

RSVPs received later than the deadline will incur an additional \$5 fee.

Biography for Beverly J. Orth

Beverly J. Orth, a Principal in Mercer's Portland office, is an attorney in Mercer's Public Sector and Nonprofit Consulting Group. She has 30 years of experience in legal and retirement consulting and has been with Mercer for 25 years.

Beverly's areas of responsibility include the design and drafting of qualified plans, ESOPs, tax deferred annuities, and deferred compensation plans; advice on compliance with federal and state laws affecting pension and welfare benefits; and analysis of potential tax and legal liability. She also assists clients with vendor searches, plan governance and fiduciary training, nondiscrimination testing, controlled group analyses, and compliance reviews.

Beverly has authored many articles related to retirement income policy and longevity risk. She has been published in the North American Actuarial Journal, Benefits Quarterly, Employee Benefit Plan Review, Contingencies, and other publications. She is a frequent speaker at symposiums and conferences sponsored by the Society of Actuaries, the Western Benefits and Pension Conference, CEBS, bar associations, and other organizations.

Beverly received her Bachelor of Science degree in mathematics from Harvey Mudd College and her Juris Doctor from Harvard Law School. She is a member of the Oregon State Bar, the State Bar of California, Oregon Women Lawyers, the Western Pension and Benefits Conference, and the American Bar Association. Beverly is also a Fellow in the Society of Actuaries.