



DAVE ALBERTS

CO-LEADER OF GLOBAL INSURANCE INDUSTRY GROUP,
PARTNER, MAYER BROWN LLP

Dave Alberts' work for the life and non-life insurance industry includes a broad range of corporate, commercial and regulatory advisory and transactional work, including corporate/M&A, regulatory, commercial, insurtech, traditional and alternative/structured reinsurance and new product development. Dave's experience includes Mergers and Acquisitions, Life and Non-Life Reinsurance, Technology and Innovation and Insurance Regulatory.



RICARDO ANZALDUA

EXECUTIVE VICE PRESIDENT, GROUP GENERAL COUNSEL,
EVEREST

Ricardo Anzaldua is Executive Vice President and Group General Counsel at Everest, a role he's held since he joined the Company in June 2023.

Ricardo has more than three decades of legal, corporate governance and (re)insurance industry expertise, spanning the U.S., Bermuda and other global jurisdictions and industries across the public and private sectors. He most recently served as Executive Vice President, General Counsel and Corporate Secretary for the Federal Home Loan Mortgage Corporation, "Freddie Mac." In this role, he led the enterprise legal, corporate secretarial and board governance functions and executed a successful organizational restructuring that created significant professional development opportunities for employees.



WARREN BALAKRISHNAN

CHIEF STRATEGY & DEVELOPMENT OFFICER, RESOLUTION LIFE

Warren Balakrishnan leads growth and strategy for Resolution Life in North America and is a member of the Resolution Life Executive Leadership Team. In his role, Warren leads the growth strategy, M&A, reinsurance and other strategic projects for Resolution Life's businesses across North America.

Select recent growth transactions led by Warren include the ~\$27bn reinsurance of Allianz' US FIA, the strategic transaction with Farmers Group for the reinsurance of all of its in-force life business and the assumption of administration for over 1.5m policyholders, and the reinsurance of ~\$10bn Lincoln National executive benefits and universal life business.

Previously, Warren was Director, M&A for Resolution Life Group and in that role was involved in founding Resolution Life Group, creating Resolution Re in Bermuda, and led the acquisition of AMP Life in Australia and New Zealand. He joined Resolution in 2013, where he focused on the formation, capital raise and transactions of the prior Resolution businesses.



MARK BINTINGER

MANAGING DIRECTOR, CORPORATE DEVELOPMENT,
PRUDENTIAL FINANCIAL, INC.

Mark is a member of Prudential's Corporate Development team and is focused on mergers, acquisitions and joint ventures across Prudential's domestic and international businesses.

Mark joined Prudential in 2020. In his time at Prudential, Mark has focused on efforts to de-risk the balance sheet and reposition the company as a less market- and interest-sensitive enterprise. The sale of PALAC, issuer of ~20% of Prudential's Variable Annuity in-force, to Fortitude Group in September 2021 was a major step in that process. Continuing in that vein, he led the efforts to reinsure a \$10 billion block of VA contracts to an affiliate of Constellation Holdings, a \$12.5 billion block of Guaranteed Universal Life policies, to Somerset Re, and a \$11 billion block of GUL policies to Wilton Re. He is currently partnering with Prismic Life Re, a Bermuda reinsurance platform where Prudential is a founding minority shareholder, to accelerate its growth. He has also worked with Prudential's international leadership as they evaluate expansion opportunities in key markets, including the acquisition of a minority stake in Alexander Forbes Group Holdings in South Africa.



NEIL CHAWHAN

MANAGING DIRECTOR, U.S. INSURANCE INVESTMENT
BANKING, RBC CAPITAL MARKETS

Neil Chawhan is a Managing Director at RBC Capital Markets. Mr. Chawhan has specialized in insurance company strategic advisory and financing transactions for the last 24 years. Prior to joining RBC, Mr. Chawhan spent 16 years at Merrill Lynch in the Investment Banking Division focused exclusively on insurance clients and two years at Keefe Bruyette & Woods.

Mr. Chawhan has worked on over 100 completed assignments since 2000 across the insurance sector. Mr. Chawhan has been a trusted advisor to clients on domestic and cross-border acquisitions and sales processes, as well as broad strategic advisory projects, including restructurings. On the financing side, Mr. Chawhan has advised clients on investment-grade and non-investment-grade debt, as well as on numerous equity and equity-linked transactions, including over 10 active book-run IPOs.



JOHN DOUCETTE

CHIEF EXECUTIVE OFFICER, AMYN TA RISK SOLUTIONS

John Doucette is a seasoned reinsurance executive who has run multibillion-dollar global underwriting businesses, most recently, as CEO of Everest's \$7 billion global reinsurance operations, and prior to that, as Global Chief Underwriting Officer for Everest Group for both insurance and reinsurance

He has significant expertise in underwriting all property & casualty lines of business around the globe, enterprise risk management, capital markets and structured credit.



SCOTT FISCHER

GENERAL COUNSEL AND HEAD OF GOVERNMENT RELATIONS,
LEMONADE INSURANCE COMPANY

Scott Fischer is the Head of Government Relations and General Counsel of Lemonade Insurance Company. Scott joined Lemonade in 2022 after years of service to New York State and counselling clients as a partner at international law firms. While in service to New York State, he was the Executive Deputy Superintendent for Insurance at the Department of Financial Services. In that role, he led several hundred employees in supervising the United States' second largest insurance market, including approximately 1,700 insurers with trillions of dollars in assets.

Prior to taking that post, Scott was first deputy general counsel and then special deputy superintendent at the New York Liquidation Bureau, where he managed a staff of more than 200 employees overseeing the liquidation proceedings of more than 25 domestic insurers, handling thousands of claims eligible for New York insurance security fund coverage, and distributing more than \$500 million in claim payments and estate dividends.



CELESTE GUTH

PARTNER, PJT PARTNERS

Celeste Guth is a Partner in the Strategic Advisory Group at PJT Partners, based in New York.

Prior to joining PJT Partners, Celeste spent time at Deutsche Bank, where she was most recently Global Head of Mergers and Acquisitions and a member of the Corporate and Investment Bank Executive Committee after being Global Head of the Financial Institutions Group.

Celeste joined Deutsche Bank in March 2016 from Goldman Sachs, where she was a Partner and Vice Chairman of the Global Financial Institutions Group and Global Co-Head of Insurance Investment Banking. Celeste held a variety of leadership positions during her 29 years at Goldman Sachs, including Head of Americas Financial Institutions Group from 2003 to 2012. During her tenure at Goldman Sachs, Celeste led a number of significant M&A, equity and restructuring transactions for insurers, as well as other financial institutions in the Americas, Europe and Asia.



SUFEN LIM

SENIOR VICE PRESIDENT, HEAD OF M&A STRATEGY,
INVESTMENTS AND BUSINESS TRANSFORMATION, TOKIO
MARINE KILN

Since joining the Tokio Marine Group in 2014, Sufen has played an instrumental role in leading various global M&A strategic transactions, business restructuring and collaborations across group companies.

Prior to joining Tokio Marine, she was an investment banker for over a decade, specializing in M&A and the Financial Services sector and a qualified UK Chartered Accountant (ICAEW).

Given her passion in Sustainability and Innovation, Sufen is a member of TMK Sustainability Committee and the TMHD/TMK Gen AI Groups.



LINDA LIN

CHIEF LEGAL OFFICER & CORPORATE SECRETARY,
SIRIUSPOINT

Linda Lin joined SiriusPoint in July 2023 as Chief Legal Officer. She was previously General Counsel and Corporate Secretary at Coaction Global (formerly Prosignt), Inc., where she led the legal, regulatory, compliance, product development and internal audit functions. Prior to that, she served as SVP, General Counsel, Business Unit Legal and co-headed Regulatory at QBE North America (QBENA). Ms. Lin has served in various legal, claims and product development roles at Berkshire Hathaway Specialty Insurance and Liberty International Underwriters. Before entering the insurance industry, she was a litigator with the law firm Willkie Farr & Gallagher.

Ms. Lin serves as president of the Sotomayor Program, which cultivates and develops future legal leaders from underserved communities and diverse backgrounds. She is a member of the Eastern District of NY Magistrate Judge Merit Selection Panel and board member of the Asian American Law Fund of NY. She also previously served as president of the Asian American Bar Association of New York.



TAIESHA MCBROOM

CHIEF LEGAL OFFICER, ASPIDA GROUP

Taiesha McBroom is currently Chief Legal Officer for Aspida Group and is responsible for the legal affairs of the entire organization. Taiesha joined Aspida after a tenure at Prudential Financial, Inc. While there, she served in various leadership roles that most recently included chief legal officer, chief investment office and alternative assets group. She also served as deputy chief legal officer, mergers and acquisitions, helping to lead international and domestic activity across various enterprises that include asset management, fintech, life and annuities. Prior to that, she held senior-level roles at Thrivent Financial, including vice president of strategic transactions, managing counsel and chief counsel. While there, she served an integral role with investments, focusing on private equity and private placements of investment-grade corporate bonds. Previously, Ms. McBroom was also partner at Dorsey & Whitney, focusing on strategic buy-side merger and acquisitions. She completed her undergraduate work at Cornell University, receiving a Bachelor of Arts in Government. She received her Juris Doctor from the University of Minnesota Law School.



BRYAN PAYNE

EXECUTIVE DIRECTOR, J.P. MORGAN

Bryan Payne is an Executive Director in the Financial Institutions Group at J.P. Morgan where he provides strategic advisory services for insurance companies across M&A and capital markets. He has expertise across both Life and Specialty / P&C markets as well as cross-border M&A. Bryan brings 15 years of experience across roles at J.P Morgan, Credit Suisse, and Morgan Stanley in addition to prior investing roles.

Bryan is based in New York, NY. He holds a B. Sc from the University of South Carolina and is a Certified Public Accountant.



STEVE ROONEY

CO-LEADER OF GLOBAL INSURANCE INDUSTRY GROUP,
PARTNER, MAYER BROWN LLP

Stephen G. Rooney represents issuers and underwriters in connection with domestic and international offerings of equity, debt and hybrid securities. He has extensive experience in negotiating and structuring M&A transactions within the insurance and financial services industries. Domestic and international clients also turn to Stephen for counsel on corporate governance matters and director fiduciary duties.

Stephen has served as transaction counsel in a variety of insurance-linked securities offerings, reinsurance sidecar formations and other structured financings in the insurance industry. Among his insurance M&A experience, Stephen advised The Hartford in its \$2.1 billion acquisition of The Navigators Group, the NASDAQ-listed global specialty insurer, and in its \$1.5 billion acquisition of the group life and disability business of Aetna.



COLIN SCAGELL

PARTNER, MAYER BROWN LLP

Colin concentrates on the Insurance sector and has advised on many of the market-leading Insurance transactions of the past two decades. He has a strong focus on cross-border public transactions, including takeovers, listings and secondary securities offerings. He also advises on insurance-linked security (ILS) transactions and on a variety of third-party capital structures at the convergence point of the financial services industry.

Colin joined Mayer Brown in September 2011 from the London office of a leading New York law firm, prior to which he qualified at a top city firm.



PAUL SCHULTZ

VICE CHAIRMAN, AON REINSURANCE SOLUTIONS

Paul Schultz serves as Vice Chairman of Aon Reinsurance Solutions as of October 2024. Prior to that, Paul led Aon's investment banking team for more than 20 years, and under Paul's leadership, Aon Securities developed a market-leading practice advising clients on transferring insurance risk to the capital markets and raising capital for (re)insurance companies. Paul began his career in banking in 1986 and spent 14 years at J.P. Morgan (and its predecessor banks), specializing in the Insurance Practice.

Paul earned a Bachelor of Science degree in Computer Science and a Bachelor of Science degree in Electrical Engineering from Northwestern University. Paul also earned a Master of Business Administration degree from Kellogg School of Management and is a Chartered Financial Analyst.



VIKRAM SIDHU

PARTNER, MAYER BROWN LLP

Insurance and reinsurance companies rely on Vikram Sidhu for counsel on corporate and regulatory insurance matters. He regularly works on sales and acquisitions of insurance and reinsurance companies and portfolios of insurance business, including legacy/runoff transactions. He has worked on a wide range of transactions involving both US and non-US acquirers and sellers in a number of different lines of insurance (property and casualty, life and health, mortgage insurance and others). Clients turn to Vikram for advice on insurance businesses and products, such as cyber, new climate risks, parametrics and trade credit.

Vikram also regularly advises insurtech clients on the establishment and growth of their businesses, as well as large tech companies on insurance products and businesses. Vikram is a transactional and regulatory specialist with an impressive client base that includes insurance carriers and global corporations. He regularly advises on M&A, joint ventures and reorganizations.



RICKY SPITZER

PARTNER, MAYER BROWN LLP

Insurers and underwriters turn to Ricky Spitzer for counsel on structured finance transactions, such as catastrophe bonds, mortality bonds, sidecars and other risk-linked securities. Ricky also represents issuers and underwriters in connection with securities offerings by insurance companies, including offerings of equity, debt and surplus notes.

Clients seek out Ricky's insight on insurance mergers and acquisitions, leveraging his particular focus on the use of reinsurance to transfer legacy liabilities.



JARED WILNER

PARTNER, MAYER BROWN LLP

Jared Wilner is a partner in Mayer Brown's New York office and a member of the Insurance group. He focuses his practice on advising domestic, foreign and alien insurers, reinsurers, insurance intermediaries and other insurance industry participants on a spectrum of insurance regulatory and transactional matters. These matters include mergers and acquisitions, joint ventures, investments, various distribution, services and other commercial contracts, reinsurance, insurtech, insurance product development, corporate governance, regulatory compliance and regulatory enforcement actions.

Jared began his career at the New York State Department of Financial Services (NYDFS), where he helped shape the policy response to various issues resulting from the 2008 financial crisis. In addition, he worked on high-leverage policy matters emanating from both the life and property and casualty bureaus, including several market conduct exams and regulatory reform initiatives.