

Jeffrey V. Kulesus

FLMI
Consultant



CURRENT RESPONSIBILITY

Jeff is a consultant and approved professional with the Bannockburn, Illinois, office of Milliman. He joined the firm in 2003.

Jeff plays a key role in Milliman's compliance consulting practice, which focuses on drafting all types of policy, rider, and application forms, filing the material and directing filings to ultimate approval. He also advises clients on life and annuity products, sales material, policy administration, regulatory compliance, direct contact with state and national insurance regulators, implementation and audit procedures, in-force administrative forms compliance, market conduct issues, company admissions, and certificate of authority issues.

EXPERIENCE

Jeff specializes in life, annuity, and health insurance policy forms and in-force policy administration regulatory compliance. He came to Milliman from Jefferson-Pilot Life, where he served as assistant vice president of policy forms and compliance. He previously served as manager of policy forms and compliance for Alexander Hamilton Life Insurance Company of America, where he also re-engineered the product development process and was responsible for corporate strategic planning, regulatory compliance and reporting, company admissions activity, and amending certificates of authority. He has worked on FA, FIA, EIUL, GMIB, GLB, GMWB, UL, UL combination, variable annuity, whole life, and other products, as well as product marketing literature at Milliman. Jeff has extensive insurance regulatory contacts throughout the United States.

PUBLICATIONS

Jeff has written articles for *National Underwriter*, the Association of Insurance Compliance Professionals, and Milliman research reports.

PROFESSIONAL DESIGNATIONS

- FLMI, Fellow, Life Office Management Institute
- AAPA, Associate, Annuity Products and Administration
- ACS, Associate, Customer Service
- AIAA, Associate, Insurance Agency Administration
- AIRC, Associate, Insurance Regulatory Compliance
- ARA, Associate, Reinsurance Administration
- CCP (CE), Certified Compliance Professional, Continuing Education
- CSF, Certified State Filer
- LUTC, Life Underwriting Training Council

AFFILIATIONS

Jeff served as national co-chair of the Association of Insurance Compliance Professionals' Government and Industry Relations Committee, a LOMA insurance textbook reviewer, and on the Handouts Committee of the Life and Health Compliance Association. He served as a presenter at AICP, LHCA, NAIC, and SOA national meetings on such topics as life insurance and annuity product development, the Interstate Insurance Product Regulation Commission, and speed-to-market issues.

EDUCATION

Honors graduate, Brigham Young University

