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NAFA Appoints 2022 Board of Directors

Annuity Leaders Poised to Navigate Continued Uncertainty, Pending and Potential Regulatory Changes

WASHINGTON (Jan. 24, 2022) — The general membership of NAFA, the National Association for Fixed Annuities, unanimously approved the slate of candidates presented for its 2022 board of directors at the association’s annual meeting held in October 2021 in Lake Las Vegas, Nev. Nominations were received from the membership at large, and candidates were vetted by the current board before being proposed during the association’s 13th annual Annuity Distribution Summit. With all present at the meeting voting in favor of the appointments, four new members and one member re-elect will join forces with current leadership to help the industry respond to a growing need for safe accumulation solutions and protected lifetime income.

Newly appointed board members include: Dan Acker of SILAC Insurance Company; Brendon Kelly of Ash Brokerage; Darcy Matz of Allianz; and Tiya Stanley of North American Company. Andrew Payne of CreativeOne will begin serving a second three-year term.

Heather Kane of EquiTrust Life Insurance Co. will assume the role of chairman of the board of directors, taking over for immediate past chair Lauri Beck of Simplicity Group. Mike Morrone of Nationwide will roll up to vice chair and Kevin Mechtley of North American Company to secretary, while David Wolfe of Advisors Excel was elected to join the executive operating committee as its newly appointed treasurer.

“For the past two years, NAFA has worked diligently to help members navigate industry challenges, from historically low interest rates and the financial impacts of the pandemic to an evolving regulatory environment. We continue to increase awareness of fixed and fixed index

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annuities as part of a financial plan and retirement income strategy for Americans. We are also advocating for the passage of a Retirement 2.0 package to make it easier than ever for individuals to save for the future and leading National Annuity Awareness Month initiatives to underscore the important role fixed annuities play in helping consumers reach their retirement goals,” said Chuck DiVencenzo, NAFA president and CEO.

“Our new leaders represent diverse ideas and backgrounds that will be integral to how we position the association to respond to continued change and to ensure the industry thrives at a time when our education, advice and products are most needed. I look forward to working with this exceptionally talented group and to see the next generation of annuity leadership continue to flourish.”

Newly elected members join a board roster that includes the following current members: Jay Brown of Delaware Life Marketing, Bruce Donaldson of the Simplicity Group, Tad Fifer of Lincoln Financial Group, Wes Gilbreath of Annexus Group, Maureen James of Summit Compliance Group, Jason Krohnke of American Equity, Paul Kruth of Western and Southern, Ryan Lex of Athene, Nate Lucius of Gradient Financial Group, Brian Peterson of TruChoice Financial Group, Janet Sipes of AmeriLife, Matt Tarkenton of Tarkenton Financial, Eric Taylor of AIG Financial Distributors, Tamiko Toland of CANNEX Financial Exchanges Ltd., Mike Tripses of Annuity Profectus, and Mark Williams of Brokers International, Ltd.

On behalf of the NAFA staff, board and membership at large, DiVencenzo recognized the contributions of exiting board members Chris Conroy of Insurance Agency Marketing Services, Inc. (IAMS), Tim Minard of Great American Insurance Group, Craig Rudesill of Nationwide, and David Schliesman of Allianz Life, presenting those in attendance with honorary service awards. NAFA extends its gratitude for their time, talent and commitment to the association.

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About NAFA

NAFA, the National Association for Fixed Annuities, is the premier trade association exclusively dedicated to fixed annuities. Our mission is to promote the awareness and understanding of fixed annuities. We educate annuity salespeople, regulators, legislators, journalists, and industry personnel about the value of fixed annuities and their benefits to consumers. NAFA was founded in 1998. For more information, visit www.nafa.com.