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## **NAFA Announces 2024 Board of Directors**

### **Industry Leaders Join Efforts to Protect the Future of Fixed Annuities and Independent Distribution**

**WASHINGTON** (Jan. 24, 2024) — The general membership of NAFA, the National Association for Fixed Annuities, approved the slate of candidates presented for its 2024 board of directors at the association’s annual meeting held recently in Nashville, Tenn. Nominations were received from the membership at large, and candidates were vetted by the current board before being proposed during the association’s 15th annual Annuity Distribution Summit.

By unanimous decision, four new members and five member re-elects will share their skills and expertise with current board leadership to help guide the association’s growth and evolution. The board will work closely with NAFA staff and its volunteer committees to protect the industry from regulatory threats while capitalizing on opportunities to enhance annuity education and awareness. Ultimately, these efforts underscore a commitment to ensuring independent distribution continues to thrive and an increasing number of consumers have access to the products and professional advice they need to retire more securely.

Newly appointed board members include Jill Esser of Magellan Financial & Insurance Services, Inc., Paul Garofoli of The Standard, Branislav Nikolic of The Index Standard, and Rocky Robbins of Brokers International. The following leaders will each begin serving a second three-year term: Jay Brown of Delaware Life Marketing; Maureen James of Summit Compliance Group, LLC; Paul Kruth of Western & Southern Financial Group Distributors; Brian Peterson of AmeriLife; and Mike Tripses of Annuity Profectus.

Kevin Mechtley of North American will assume the role of chairman of the board of directors, taking over for immediate past chair Mike Morrone of Nationwide. David Wolfe of Advisors Excel will roll up to vice chair and Andrew Payne of CreativeOne to secretary, while Eric Taylor of Corebridge Financial was elected to join the executive operating committee as its newly appointed treasurer.

“This is an interesting time for the fixed annuity industry. Economic and financial pressures are generating significant interest in risk mitigation strategies and the desire for creating supplemental lifetime income, which our products uniquely afford consumers. Therefore, it’s no surprise that

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fixed deferred and fixed indexed annuities experienced record sales again in 2023,” said Chuck DiVencenzo, NAFA president and CEO. “Yet regulatory forces like the Department of Labor have maligned our products and independent distribution, which are essential to solving the nation’s retirement crisis. Our board represents a diverse group of stakeholders passionate about ensuring we work in the best interest of everyday retirement savers, stave off burdensome regulation, and continue to advocate, educate and integrate across the industry for a brighter collective future.”

Newly elected members join a board roster that currently includes: Dan Acker of SILAC Insurance Company, Jeff Barnes of EquiTrust, Emily Cramer of Simplicity Group, Tad Fifer of AmeriLife, Maureen James of Summit Compliance Group, Jason Gould of Carlton Fields, Matt Johnson of American Equity, Brendon Kelly of Ash Brokerage, Ryan Lex of Ibexis Life and Annuity Insurance Company, Luke Loewen of Gradient Annuity Brokerage, Darcy Matz of Allianz, Tiya Stanley of F&G Life & Annuities and Igor Zamkovsky of BlackRock.

On behalf of the NAFA staff, board and membership at large, DiVencenzo recognized the contributions of exiting board members Wes Gilbreath of Annexus Group and Mark Williams of Brokers International, while wishing Janet Sipes of AmeriLife well on her retirement. These individuals received commemorative plaques and pens in honor of their time and talent.

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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’s membership represents every aspect of the fixed annuity marketplace covering fixed annuities sold by independent agents, advisors and brokers. NAFA was founded in 1998. For more information, visit [www.nafa.com](http://www.nafa.com).