

THE COUNCIL
CFO CONFERENCE
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Jeff Lefebvre

Founder
PriSim Business War Games Inc.

Jeff Lefebvre is the founder of PriSim Business War Games Inc. and has over 25 years of experience teaching business and financial acumen. Prior to forming PriSim, Lefebvre worked with the World Headquarters Division of Andersen Consulting (now Accenture) where he led information technology, strategy, re-engineering, business process design and systems integration engagements. In his role at PriSim, Lefebvre helps clients improve their understanding of business and decision-making. He is actively involved in all phases of PriSim service delivery including modeling, simulation and seminar development as well as program instruction/facilitation.



Max Hernández

Vice President
PriSim Business War Games Inc.

Max Hernández is vice president at PriSim Business War Games Inc. In his role, he is both an instructor and simulation developer focusing on mathematical business models. He has implemented ERP systems, built Online Quoting Applications, architected Corporate Brand Management Systems and deployed E-Commerce Websites among other projects. Applying his experience to the design and delivery of simulation-based business training, Hernández works with PriSim's clients to help their employees to strengthen their understanding of strategy, finance, and business decision-making.



Shawn Halsey

Senior Vice President
Merrill Lynch

Shawn Halsey joined Merrill Lynch Wealth Management in 2010 and brings more than 19 years of working with institutional clients and high-net-worth families to address their wealth management needs. He was recognized on the Forbes "Best-in-State Wealth Advisors" 2018 and 2021 list. In addition, Halsey holds the Certified Private Wealth Advisor® (CPWA®) designation, awarded by the Investment & Wealth Institute™ and the Chartered Retirement Planning CounselorSM (CRPC®) designation.



Bill Pomponi

Audit Partner
Crowe LLP

Bill Pomponi is an audit partner at Crowe LLP located in the Hartford, Connecticut office. He has 20 years of experience in the insurance industry, with more than 15 years of experience in public accounting. Pomponi specializes in the insurance industry, serving insurance clients in the traditional and alternative insurance markets as well as insurance agencies and brokers. He is the lead audit partner on many of the firm's insurance audit engagements. He has significant experience on a wide range of insurance engagements with financial reporting on both a GAAP and Statutory basis.



Daniel Kusaila

*Tax Partner
Crowe LLP*

As Partner of Crowe's Insurance Tax Practice with more than 20 years of public accounting experience, Kusaila has spent his entire career serving property and casualty, accident and health, life insurance companies and captives in global and multi-state environments. He has significant expertise in the taxation of traditional insurance companies, insurance intermediaries including insurance agencies and brokers, single parent captives, risk retention groups, association captives, cell companies, risk pools and reciprocal insurance companies. Kusaila's specific areas of concentration include federal and state tax compliance and planning, structuring of off-shore and on-shore captive insurance companies, mergers, acquisitions and reorganizations, private letter rulings, federal excise tax compliance and GAAP and SAP financial statement reporting.



Jim Miller

*Chief Sales & Marketing Officer
First Insurance Funding*

Jim Miller has spent his entire career in the financial services Industry including commercial leasing, marine wholesale finance and has a total of 38 years in the commercial P&C premium finance space. He oversees First Insurance Funding's sales and marketing teams and helps manage the agency loan portfolio, which has now grown to over \$400 million in total commitments. Miller has been with First Insurance Funding since 2004.



Ben Rubin

*Chief Risk Officer
First Insurance Funding*

Ben Rubin has been a member of the Wintrust family for 15+ years. He led the Wintrust Insurance Banking team for nine years as SVP at Lake Forest Bank & Trust, one of Wintrust's largest banks. Prior to joining First Insurance Funding as CRO, Rubin was head of mergers & acquisitions at Integro Insurance Brokers. In his position as CRO, he is responsible for risk management for both FIRST P&C (U.S. & Canada) and Wintrust Life Finance.



Dana French

*Senior Vice President of National Programs
First Insurance Funding*

Dana French has been an integral part of First Insurance Funding family for more than 15 years. She began her FIRST career as a staff accountant, moved through the ranks to SVP controller, and eventually served on the finance shared services team at Wintrust Headquarters as SVP of finance operations. In 2019, French made the move back to FIRST as the SVP of National Programs. She received her CPA in 2008 and has a master's degree in accounting and finance management.



Ce Harrison, CGMA, CPA (Inactive)

*Chief Financial Officer
The Council of Insurance Agents & Brokers*

Ce Harrison is CFO for The Council. She runs the CFO Working Group and the CFO Conference. Previously, Harrison served as CFO for the Advanced Medical Technology Association, where she managed accounting and finance for the association, its research foundation, its PAC and overseas offices. Prior to AdvaMed, Harrison spent six years as CFO and COO of The Roberts Group, LLC, a DC-based trade association management firm serving mostly FDA regulated food, flavor and color manufacturing industries, as well as the Japanese American Memorial Foundation. There she also founded The Hazmat Shippers Association.



Joel Wood

*Senior Vice President, Government Affairs
The Council of Insurance Agents & Brokers*

Joel Wood is the senior vice president of government affairs for The Council. He has been the top regulatory and government affairs officer at The Council since 1993. Over the course of his career, Wood has been deeply engaged in many issues impacting the commercial insurance brokerage industry—from health insurance reform efforts, to terrorism reinsurance, to regulatory reforms both small and large, at both the federal and the state level—and has received numerous accolades as one of the top lobbyists in the financial services industry.



Joel Kopperud

*Vice President, Government Affairs
The Council of Insurance Agents & Brokers*

Joel Kopperud is vice president of government affairs for The Council. He represents Council member firms and their political interests on Capitol Hill, working closely with members of Congress and their staff on issues impacting the commercial insurance brokerage industry. Specifically, Kopperud is working to reform the Affordable Care Act and was instrumental in The Council's successful efforts to guide legislation through Congress that renewed TRIA and created a national broker licensing regime.



Blaire Bartlett

*Director, Government Affairs
The Council of Insurance Agents & Brokers*

Blaire Bartlett is the director of government affairs for The Council of Insurance Agents & Brokers. She represents Council member firms and their interests on Capitol Hill, with a focus on flood insurance. Bartlett joined The Council after more than a decade on Capitol Hill supporting moderate members of Congress where she most recently specialized in financial services, global health, appropriations and working across the aisle to form coalitions and pass legislation.



Vladimir Gololobov

*Vice President, International
The Council of Insurance Agents & Brokers*

Vladimir Gololobov is the vice president of international for The Council. He is the primary contact for more than 40 internationally headquartered Council member firms and is responsible for cultivating, managing and strengthening relationships with those members. Gololobov most recently served as senior business strategy advisor at the U.S./Saudi Arabian Business Council. Prior to that, he worked as project manager at the U.S. Coalition of Service Industries (CSI).



Nick Lozano

*Director, Technology
The Council of Insurance Agents & Brokers*

Nick Lozano is director of technology for The Council. He is responsible for The Council's internal technology infrastructure and runs The Council's CIO Working Group. Lozano joined The Council in 2011 after serving as a software engineer at Accenture. Lozano is also a professionally trained and accomplished chef.