

Ameritas Announces Officer Elections

June 10, 2014// Lincoln, Neb.// JoAnn Martin, president and chief executive officer, announces the following officer elections, effective May 1.

Jim Barone was promoted to vice president – group business development – Ameritas Life and Ameritas Life of New York. Barone is responsible for the leadership and development of a national sales team that markets employer-paid and voluntary dental and vision coverage. He also helps build awareness and demand for Ameritas dental and vision products sold through affiliated insurance companies. He joined Ameritas in 2013.

Barone earned his B.A. degree in philosophy from the University of Cincinnati, Cincinnati, Ohio, and his juris doctorate degree from the University of Toledo College of Law, Toledo, Ohio.

He is a member of the Ohio State Bar Association and Cincinnati Bar Association.

Karen Gustin was elected to senior vice president – group distribution – Ameritas Life and Ameritas Life of New York. Gustin is responsible for managing the group division's sales force and overall leadership, oversight and strategic vision for the group field sales distribution and all group division business development partners. She continues leading the internal national accounts team, strategy and national accounts performance and is also responsible for all managed care operations, including lease networks.

Gustin began her career at Ameritas in 1983 as a dental claim examiner trainee. She has held numerous leadership roles in the group division, most recently as senior vice president - group field sales, national accounts and broker blocks.

A graduate from the University of Nebraska - Lincoln, Gustin earned a bachelor's degree in education. She is a member of the American Marketing Association, past member of the Lincoln Association of Health Underwriters and the IBC advisory boards, and is the current board president of Lancaster County's Voices of Hope. She is a past member and past chair of the NADP (National Association of Dental Plans) board and a current board member of NAVCP (National Association of Vision Care Plans).

Chris Keffalos, ASA, MAAA, was promoted to vice president – individual disability income actuarial – Ameritas Life and Ameritas Life of New York. In this position, he is responsible for pricing disability income products, financial reporting and valuation; reinsurance treaties and administration; and risk management.

Keffalos has been with the company since 1985 when he started as a disability income actuarial student. He has held several management positions, the most recent as second vice president of disability income actuarial.

He graduated from Ohio State University, Columbus, Ohio, with a B.S. degree in mathematics. He is a member of the Society of Actuaries and American Academy of Actuaries.

Barry Koklefsky, FSA, MAAA, was elected second vice president and associate actuary – Ameritas Life and Ameritas Life of New York. He is responsible for managing the annual forecast for life and annuity products, and providing financial and experience data and capital management strategies for product management and development.

Koklefsky has more than two decades of insurance industry experience in the United States and Canada. Through his continuous improvement approach, he enhanced many processes involving financial reporting and analysis for life, annuity and other insurance products.

A graduate of Lebanon Valley College in Annville, Penn., Koklefsky earned his B.S. degree in actuarial science with a minor in Spanish. He is an active volunteer with the Society of Actuaries, Canadian Institute of Actuaries as well as the Volunteer Income Tax Assistance Program administered by the Internal Revenue Service.

Deb Ramsay, ACS, was promoted to second vice president – group network management – Ameritas Life and Ameritas Life of New York. Among her primary responsibilities are directing and overseeing provider network development, persistency and management on a national level.

Ramsay started working at Ameritas in 1990 and has held a variety of positions. She most recently was a director of managed care for the group division. She studied business at the University of Nebraska – Lincoln and is a member of the National Association of Dental Plans operations committee.

Michael Weckenbrock, JD, CLU, ChFC, was elected vice president – retirement plans business risk, compliance and controls – Ameritas Life and Ameritas Life of New York.

Weckenbrock joined the company in 2007 as a part-time law clerk in the Cincinnati office. He was promoted to full-time attorney, assistant counsel and most recently second vice president – corporate compliance.

He graduated from Centre College, Danville, Ky., with a bachelor's degree in economics and government and also studied in Strasbourg, France. He earned his juris doctorate from Salmon P. Chase College of Law, Northern Kentucky University, Highland Heights, Ky.

Kelly Wieseler, FSA, MAAA, was elected senior vice president, group chief actuary and underwriting – Ameritas Life and Ameritas Life of New York. He is responsible for managing the group division's bottom line, setting the strategic financial direction and overseeing the underwriting and pricing strategy for the division.

Wieseler joined Ameritas in 1997 as an actuarial associate in the group actuarial department. He has held numerous positions in the group division of Ameritas Life and most recently served as senior vice president, group chief actuary and provider relations.

He graduated from the University of Nebraska – Lincoln with a B.S. degree in actuarial science and a minor in mathematics. Wieseler is an active member of the YMCA board of directors and the Nebraska Actuaries Club.

Terry Young, LLIF, was elected vice president – corporate development – Ameritas Life and Ameritas Life of New York. In his new role, Young will identify potential growth opportunities through company acquisitions, strategic investments, partnerships and business alliances. Young joined Ameritas in 2000 and has held numerous positions in the group division, most recently as vice president of business development and acquisitions.

A graduate of the University of Nebraska – Lincoln, he earned his B.S. degree in business with an emphasis in finance. He earned the designation of the LIMRA Leadership Institute Fellow (LLIF) in conjunction with the Wharton School of Executive Education.

Young is a member of LIMRA, ICMG (Inter-Company Marketing Group), SIIA (Self-Insurance Institute of America) and IFEBP (International Foundation of Employee Benefit Plans). He is active in the Lincoln Chamber of Commerce and is a former member of the Lincoln Historic Preservation Commission and Water Conservation boards.

Jerry Herbert, CPA, was promoted to vice president, chief financial officer and chief operating officer – Ameritas Investment Partners and Ameritas Mortgage Funding, Inc. In this position, Herbert directs the overall accounting, financial and cash management operations of Ameritas Investment Partners (AIP) as well as manages information technology, investment operations and marketing areas of AIP.

He joined the company in 2005 as a director of finance and accounting and most recently served as chief financial officer of Ameritas Investment Partners.

Herbert earned his B.S. degree in business administration from Xavier University, Cincinnati, Ohio, and is a certified public accountant. He is a member of the Ohio Society of CPAs.

Tina Udell, CFA, was promoted to vice president and managing director – Ameritas Investment Partners and Ameritas Mortgage Funding, Inc., effective July 1. In this position Udell is responsible for the portfolio management and performance of the insurance companies' corporate bond portfolios.

Udell joined the company in 1998 as a research analyst. She has held a variety of positions during her tenure, most recently as portfolio manager – fixed income.

She earned her B.S. degree in finance from the University of Nebraska – Lincoln. She is a general securities registered representative of Ameritas Investment Corp. and investment advisor representative of Ameritas Investment Partners. Udell is a trustee and treasurer of the Community Health Endowment of Lincoln, a member and past president of the CFA Society of Nebraska and a member of CFA Institute.

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