



## Jim Kais

Senior Vice President – Retirement Plans  
Ameritas Life  
Lincoln, Nebraska

### Work History

- Elected senior vice president, retirement plans – Ameritas Life Insurance Corp. – 2018
- Senior vice president and managing director – Transamerica Retirement Solutions – 2006 to 2018
- Vice president, client service – ADP TotalSource – 2003 to 2006
- Director, plan sponsor services – Prudential Retirement – 2000 to 2003
- Vice president, client service manager – Merrill Lynch – 1997 to 2000

### Education

- BA degree, Economics and Business Administration, Ursinus College, Collegeville, Penn.

### Professional Designations

- FINRA Series 6, 63 and 26 securities

### Business and Community Activities

- NAPEO, member since 2006

### Honors and Awards

- Testified before Congress as a policy and subject matter expert on pooled retirement plans, the fiduciary regulations and on state run retirement plans.
- Executive of the Year award, 2016