

# CFA SOCIETY VICTORIA 8<sup>TH</sup> ANNUAL CFA FORECAST DINNER



**Jeremy Bell, CFA**  
**Partner,**  
**George and Bell Consulting**

Jeremy has worked in the pension, benefits and investment fields for 15 years. He advises clients on actuarial and investment matters related to pension and benefit plans. He also advises lawyers and provides expert witness testimony.

Jeremy has enjoyed varied experiences in the actuarial and investment fields. Most recently, as Chief Actuary and Chief Investment Officer of Healthcare Benefit Trust he was responsible for setting contribution rates and reserves and overseeing the investments of the \$1 billion health and welfare trust.

Prior to his role at Healthcare Benefit Trust, he gained pension and investment experience working at major consulting firms. He was the Western Region leader of Investment Consulting for an international consulting firm. In this role, he advised institutional investors (i.e., pension, disability, automobile insurance, and foundations) with assets totaling \$30 billion on asset mix, investment managers and investment policies and procedures. In a previous role at another international consulting firm, he consulted on liability and regulatory issues for pension plans.

Jeremy is a frequent speaker at industry events. Recent speaking engagements include: Canadian Pension & Benefits Institute, Federated Press, Canadian Institute of Actuaries and the Canada Cup of Investment Management.

## QUALIFICATIONS & EDUCATION

Jeremy is a Fellow of the Canadian Institute of Actuaries and is a Fellow of the Society of Actuaries. He is also a Chartered Financial Analyst charterholder.

Jeremy is active with the Canadian Institute of Actuaries. His volunteer commitments include:

- Chair, Post-Employment Benefits Committee
- Member, Group Insurance Committee
- Member, Continuing Education Committee
- Member, Continuing Education Group Sub-Committee
- Chair, Task Force charged with drafting CIA Public Policy on Self-Funded Long-Term Disability Plans

Jeremy is also a current or former member of the following boards/committees:

- Member, British Columbia Municipal Pension Board of Trustees (former)
- External Investment Committee Member, Alberta Public Service Pension Board (current)

He graduated from the University of Victoria in 2000 with a Bachelor of Science in Honours Mathematics. He earned the Jubilee Medal from the University of Victoria, awarded to the student with the highest graduating grade point average in the Faculty of Science.