

**Jody Puffett**  
Partner



## Select Executive Experience

### **Ibexis Life & Annuity Insurance Company (2021-2022)**

EVP/CFO and CRO

### **Transamerica/Aegon (1991-2020)**

Head of Finance and Actuarial Modernization (2016-2020)

Associate CFO (2013-2016)

VP, Corporate Risk and Actuarial (2011-2013)

VP Financial Information and Investor Relations (2010-2011)

Director of Strategic Planning and Development (2008-2010)

Senior Investor Relations Officer (2007-2008)

Internal Audit Manager (2004-2007)

Senior Tax Manager (1997-2004)

Investment Division Manager (1991-1997)

## Core Competencies

Finance Transformation

Budgeting

FP&A

Actuarial Model Conversions

Strategic Planning

Internal Audit

Risk

Corporate Tax

Investor Relations

Finance Systems Implementation

Data Governance

Operations

Restructuring

## Executive Profile

Jody Puffett is a Partner in the Chicago office of SeatonHill. Ms. Puffett is a highly results-oriented leader with over three decades of experience in the financial services industry across multiple finance, risk, actuarial, and technology disciplines. With a proven track record of positively influencing strategic and tactical organizational initiatives, she has partnered with stakeholders at all levels by building relationships based on accountability, reliability, and delivering results. Jody also navigates through formal and informal structures to enhance and streamline information flow to key stakeholders, with a demonstrated ability to understand, assess, and communicate pertinent factors, trends, and issues which impact a company's business environment. Jody has also earned the 2018 Digital Insurance Women in Insurance Leadership Award and the 2017 Iowa Women's Foundation Ovation Award.

## Education & Certifications

Master of Science in Tax

Golden State University

Certified Investments and Derivatives Auditor

CPA (inactive)

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**Our partners have deep experience across multiple industries, and can quickly integrate into your organization to provide the insights you need to succeed in today's marketplace.**

**Jody Puffett**  
Partner



## Key Experience

**Life Insurance & Annuity Company Startup:** Jody served as CFO and CRO for this new PE backed startup insurance company with responsibility for financial reporting, tax, investment reporting, human resources, and enterprise risk management (ERM) functions. She implemented accounting and financial reporting operations and infrastructure, including a new general ledger system, statutory reporting software, and expense management system. Jody also engaged new audit and tax partners, and established the ERM framework and risk governance functions. She was part of the startup executive team responsible for establishing a relationship with a third party insurance administration partner and launching the company's first product.

**Insurance Holding Company:** Jody served in multiple executive leadership positions over nearly 3 decades for this industry leading company, including Head of Finance Transformation, Divisional Associate CFO, and several VP roles.

As Head of Finance Transformation, she was the executive sponsor charged with transforming and standardizing the financial reporting processes and technology infrastructure of 14 legacy divisions. This was a multi-year program that included establishing a data governance framework, development of a cloud data warehouse, implementation of a common accounting rules engine for 26 policy administration systems, and rationalization of actuarial modeling platforms/actuarial model conversions. Jody also managed a multi-discipline program team of ~320 FTEs across accounting, financial reporting, actuarial, technology, and project management. She oversaw the implementation of functionality to comply with new

IFRS 17 reporting standards and managed the finance team responsible for partnering with third party administrators to implement new policy administration systems and support legacy administration system conversions.

As Associate Divisional CFO, Jody was responsible for analysis and oversight of financial reporting for annuity, mutual fund, and retirement plan lines of business (including IFRS results, capital, hedging and budget). She also partnered with product development team on new product ideas and in-force management solutions.

As VP of Corporate Risk and Actuarial, Jody oversaw the actuarial team responsible for consolidated statutory reporting, cash flow testing, and tax reserves. She also analyzed, redesigned and automated existing actuarial processes to reduce cycle times, improve data quality, and streamline analytical reviews.

As VP of Financial and Investor Relations, Jody was responsible for cross functional coordination of business initiatives among the CFO senior management team (Chief Risk Officer, Chief Actuary, Chief Accounting Officer, Treasurer and Chief Tax Officer). She reviewed and analyzed consolidated IFRS earnings, sales, and product margins. Jody also oversaw CEO and CFO communications of financial information, business objectives, and strategic planning initiatives to the Board of Directors, regulators, rating agencies, investors, and clients.

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