



# LIMRA WELCOMES A NEW PRESIDENT AND CEO

**DAVID LEVENSON, DBA, CFA, FSA**

*PRESIDENT AND CHIEF EXECUTIVE OFFICER, LIMRA, LOMA, AND LL GLOBAL, INC.*

**T**he new year at LIMRA launches a new era, as David Levenson takes the reins as president and chief executive officer on January 1, 2019. We look forward to hearing his voice in this column, as he is uniquely qualified to serve as the leader of the world's largest association of life insurance and financial services companies.

Levenson most recently was a principal at Edward Jones, where he served on its management committee since 2015. He was responsible for all products distributed through its network of 17,000 advisors in the United States and Canada. Prior to joining Edward Jones in 2012, he was president of wealth management at The Hartford Financial Services Group. In this capacity, he led the largest of three operating divisions at The Hartford with core earnings of \$1.1 billion and a staff of 5,000. Levenson also has considerable international experience. As president and CEO of Hartford Life Insurance K.K. in Tokyo, he was responsible for leading the largest annuity provider in Japan.

Levenson holds his Bachelor of Science from the Wharton School, University of Pennsylvania, his M.B.A. from Columbia Business School, and a doctorate in business administration from The School of International Corporate Strategy at Hitotsubashi University in Tokyo, Japan. He is a Chartered Financial Analyst (CFA) and a Fellow, Society of Actuaries (FSA). He also served on the LIMRA LOMA Secure Retirement Institute Board of Directors when it was first established. He was named charter chair in 2014, where he was instrumental in developing its mission and governance. He also served on the LL Global Board in 2012. In addition to accepting his role as president and CEO of LIMRA, LOMA, and LL Global, Levenson will be a member of the LL Global Board of Directors.

Brandon Carter, president and chair of USAA Life Insurance Company and Chair of the LL Global board of directors served on the committee that performed an exhaustive

search for LIMRA's new leadership. He states, "Dave is well recognized throughout the industry as a talented and visionary leader and is uniquely qualified to guide this important trade association at this critical time for our industry. I look forward to working with Dave to ensure a smooth and successful transition."

Bob Kerzner, former president and CEO of LIMRA, LOMA and LL Global agrees, "Dave is a hands-on leader with a consistent record of delivering solid top and bottom-line results. I am confident he will be a strong leader and advocate for LIMRA and LOMA, ensuring the organization continues to exceed our members' expectations."

Looking forward to this next adventure, Levenson says, "I'm honored to have the opportunity to lead LIMRA, LOMA and LL Global. This is an exciting time for the life insurance and retirement industries. I want to ensure that we continue to provide our membership with compelling and actionable research, education and training so that they may best serve their customers."

For more insights and a look forward at 2019, see our Conversation with Dave Levenson on page 7. [🌐](#)



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**— Dave Levenson**

