

## **PETER A. MARION, FSA, MAAA, MST**

**Peter A. Marion** is Assistant Vice President, US Taxation, for the United States Operations of Sun Life Financial, Wellesley Hills, Massachusetts. He oversees all aspects of the IRS Audit and Appeal process, including managing audits, writing protests and negotiating settlements at Appeals. He also provides actuarial support on tax reserves, tax savings ideas, and new developments in taxes. He has over 35 years of life insurance experience, and over a quarter century of life insurance taxation experience.

He was an elected member of the inaugural Council of the Society of Actuaries Taxation Section from 2004 to 2006, and he was elected to a three-year term in 2007. He was a member of the American Academy of Actuaries' Life Reserve Work Group (Co-Chairman of the Tax Advisory Subgroup) and a member of the AAA Life PBA Tax Resolution Group. He has been a member of two ACLI tax Task Forces as well as the ACLI Exploratory Tax Reserves Working Group and the ACLI/AAA LRWG Tax Liaison Subgroup. He has been Program Chairman, Vice President and President of the Boston Actuaries Club, Co-chairman of the Federal Income Tax Subcommittee of the Hartford Actuaries Club, Chairman of the Society of Actuaries Task Force on Smoker/Nonsmoker Mortality, and Chairman of the LOMA Financial Management and Reporting Committee. He has been a moderator, panelist or workshop chairman at various meetings of the Society of Actuaries, the Boston Actuaries Club, the Hartford Actuaries Club, the Middle Atlantic Actuarial Club, the Insurance Tax Conference, the Hartford Institute on Insurance Taxation, the Insurance Accounting and Statistical Association, and the American Statistical Association. He has been a presenter at several Society of Actuaries seminars, most recently *US Federal Income Taxation of Life Insurance Companies, Tax Reserves and Related Items*, and *Preparing for Change under PBA for Life Products*.

He is a Fellow of the Society of Actuaries and a Member of the American Academy of Actuaries. He has a Master of Science in Taxation from Bentley College and a Bachelor of Science in Applied Mathematics from Brown University.