

Joshua Gerdes
Trilogy Actuarial Solutions LLC
www.trilogyactuarial.com
(346) 348-2758

Sep-2020 to Present: Trilogy Actuarial Solutions LLC

Founding Partner

At Trilogy, our goal is to see clients prosper. We strive to integrate into your organization and provide innovative solutions to your actuarial needs.

Jan-2012 to Aug-2020: Allen Bailey & Associates, Inc.

Consulting Actuary

As a consulting actuary, I provided a wide range of actuarial consulting services. Our clientele consisted mostly of fraternal, small to med size insurance companies, and regulator agencies.

- Developed over 20 accident and health products including but not limited to Medicare supplement, short term major med, cancer, critical illness, hospital indemnity, and personal accident
- Experience developing innovated products:
 - Developed the first infertility insurance product in the state of Texas
 - Developed contemporary insurance products related to the “gig economy”
- Experience with pricing life and annuity products
- Provided asset adequacy analysis including, but not limited to, cash flow testing, gross premium valuation, and premium deficiency reserve testing
- Developed companywide business pro forma projection models
- Developed statutory reserves, GAAP reserves, and IBNR claim estimates for life, annuity, and accident and health products
- Performed various experience studies for life, annuity, and accident and health products.
- Completed yearly re-rating analysis for over 10 accident and health products, including experience analysis, state filings, and responding to regulatory objections
- Experience leading and managing actuaries
- Experience with quarterly and annual statement development
- Examined accident and health products for New York Examinations
- Helped clients set annuity crediting rates by developing various rate setting tools
- Performed illustration actuary testing
- Performed risk-based capital analysis
- Performed audit support

Jan-2003 to Dec-2011:

Various

I have held several non-actuarial jobs. A complete history is available upon request.

Education and Professional Designations

- Bachelor of Science in Mathematics from the University of Texas at Austin, May 2011
- Associate of the Society of Actuaries, November 2017
- Member of the American Academy of Actuaries, January 2018
- American Academy of Actuaries Life and Health Qualifications Seminar (Sitting November 2020)

Software

- Microsoft Suite (Excel, Access, etc.)
- Moody’s Analytics AXIS