Scott M. Kline, CFA, ASA **scott@scottkline.me**
4085 S Old 3C Hwy **614-499-7365**
Westerville, OH 43082

Professional Experience

Northwest Chapel - Dublin, OH

Church Administrator **June 2024 - Present**

In this role, I oversee the business functions of a vibrant, growing multigenerational church, including Finance, HR, IT, maintenance, security, communications, etc.

Accomplishments as church administrator include:
- Acquisition of new insurance policy after being dropped by previous carrier
- Oversight of fire panel replacement project
- Recapture of marketing & communications from external firm, including website, newsletter, social media, etc.
- Increased use of church management software for event registration, giving, communications, etc.
- Reviewed church bank accounts & Increased interest income on savings
- Development of electronic time sheet collection process
- Hiring and onboarding of worship leader

Nationwide – Columbus, OH

Asset/Liability Management Leader / Senior Investment Professional **July 1998 – May 2024**

I was part of the investment management process for over 25 years, in roles of increasing responsibility, consistently receiving strong performance ratings. Through this experience, I was a leader in developing Nationwide's Strategic Asset Allocation (SAA) targets, investment strategies, risk limits, and our Asset/Liability Management (ALM) approach for over $130B in assets. Our collaborative process involved me acting as a liaison between the Office of Investments and other areas of the company, often explaining complex investment concepts to senior leadership.

I managed a team of 4-6 seasoned investment professionals who were responsible for:

1) strategic asset allocation for Nationwide's property & casualty, defined benefit, defined contribution, retiree medical, charitable foundation, and asset allocation mutual fund portfolios. Key tasks include working with our business partners to understand the company’s liabilities, development of asset allocation recommendations, and building presentations and sharing with the appropriate governing bodies / senior leadership.
2) investment strategy development and daily pricing indications for fixed annuities and life insurance products (Supportable rates), including attribution analysis of actual vs. expected performance, monthly communication to clients, and responding to client inquiries and concerns.
3) development of a daily optimization process to evaluate the effectiveness of our current pricing strategies vs. the current market and our risk limits. This tool allowed us to pivot investment strategies frequently in the volatile market environment of 2022 - 2024 and increase competitiveness and fixed product sales.
4) analysis of insurance company peer investment strategies, which led to identification of new opportunities and increased business competitiveness
5) partnership with our life and annuity subsidiaries to develop investment risk targets for WAL/duration, credit risk, alternatives targets and limits, etc. and temporary investment programs
6) capital market/long-term return, volatility and correlation expectations across fixed income, equity and alternative asset classes

7) economic scenario generation using Conning's GEMS scenario generator
8) fixed income asset modeling [using MG-ALFA and GGY-AXIS] to support life company asset/liability management (ALM) procedures
9) investment income forecasting and capital planning to support quarterly forecasts, annual Operating Plan and Strategic Plan
10) discount rate determination for defined benefit pension plans
11) new product development, including a successful proof-of-concept and launch for Nationwide's Pension Risk Transfer (PRT) business

Actuarial Assistant-Life **May 1995 – July 1998**

- Determined investment needs for life company fixed income portfolios
- Analyzed mutual funds and compared to benchmarks
- Developed asset/liability models in PTS
- Projected future asset yields to determine policyholder crediting rates
- Performed expense studies

Actuarial Intern-Life **May 1994 – May 1995**

- Developed FoxPro program to report mutual fund performance to participants in group annuity contracts
- Performed expense studies

Education

CFA Charter holder (2001)
Associate, Society of Actuaries (2000)
B.A. Mathematics
Ohio Wesleyan University
Summa Cum Laude
Phi Beta Kappa

Other Relevant Skills and Experiences

Experience in church management across a wide range of functions
Deep knowledge of investment security types and investment strategies
Collaboration across departments and varying viewpoints
Problem solving both in a large and complex corporation and mid-sized church
Over 10 years of people leadership with minimal turnover
Maxwell Certified Leadership Team
People School
Dale Carnegie Training
Past Treasurer of Delaware Christian Church and Delaware Christian Academy
Past co-Treasurer (Contributions) at Sunbury Christian Church
Past Deacon at Delaware Christian Church and Sunbury Christian Church
Grace Polaris Church Advanced Leadership Training 2023-2024
Small Group Leader
Enneagram Type 1 (Reformer)
StrengthsFinder – Deliberative | Responsibility | Relator | Analytical | Achiever | Learner

References

Available upon request