

Scott M. Kline, CFA, ASA (inactive)
4085 S Old 3C Hwy
Westerville, OH 43082

scott@scottkline.com

614-499-7365

Professional Experience

Grace Polaris Church - Westerville, OH

Director of Finance In Training / CFO

March 2025 - Present

I was hired for succession planning purposes to ultimately be the Director of Finance, when the current leader, who is in his 70's, retires. In the meantime, I have been working on transformation and growth initiatives, including developing the budget for fiscal year 2026, updating pay structures for the entire 100 person staff (including child care center), modernizing the church's time off policy, reviewing the health plan benefit options for 2026, measuring analytics, and crafting an agreement to bring a seminary program to our church. I have also been working on improving the stewardship focus of our church, through data analysis, communication via storytelling, and vision casting. Functionally, I have been the CFO, and the current director has been the Controller.

Northwest Chapel - Dublin, OH

Church Administrator / Director of Administration

June 2024 – March 2025

In this role, I oversaw the business functions of a vibrant, growing multigenerational church, including Finance, HR, IT, maintenance, security, and communications. This experience broadened my leadership skills in a church setting, beyond a specialized corporate setting to a diverse set of disciplines.

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

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), currently inactive

B.A. Mathematics

Ohio Wesleyan University

Summa Cum Laude

Phi Beta Kappa

Other Relevant Skills and Experiences

Deep knowledge of investment security types and investment strategies

Collaborative problem solving both in a large and complex corporation and two churches

Over 10 years of people leadership with minimal turnover

Maxwell Leadership Certified Team

Ambassador for Branches Worldwide and volunteer on Branches Impact Fund Team

Founder DeepRootedBelievers.com

Grace Polaris Church Advanced Leadership Training Graduate

References

Available upon request