INSURER INVESTMENT FORUM XXI
Speaker Biographies

Alton Cogert | CFA, CPA, CAIA, FDP, CGMA | President & CEO | Strategic Asset Alliance

Alton R. Cogert, CFA, CPA, CAIA, FDP, CGMA, President and Chief Executive Officer. Mr. Cogert formed Strategic Asset Alliance in 1994.

Currently, Mr. Cogert is an Independent Member of American Fidelity Assurance Company's Senior Investment Committee. Previously, he has served as a technical advisor to the NAIC Invested Assets Working Group. He is a former member of the Board of Directors and former chairman of the Investment Committee of the National Alliance of Life Companies.

Prior to SAA, Mr. Cogert accumulated more than 20 years of financial institution experience, including over 10 years of experience in senior financial management. He is a Chartered Financial Analyst, a Certified Public Accountant, Chartered Alternative Investment Analyst and a Financial Data Professional Charterholder. Mr. Cogert holds a BS from the Wharton School of the University of Pennsylvania and an MBA from the University of Southern California.

Daniel G. Smereck | Managing Director & Principal | Strategic Asset Alliance

Daniel G. Smereck, Managing Director, is the primary consultant for SAA's governmental risk pooling clients. Mr. Smereck has over 20 years of experience across investments, insurance, corporate finance, statistical analysis, and information technology.

Prior to joining SAA in 2003, Mr. Smereck was Senior Vice President and Chief Investment/Information Officer for a large, regional medical malpractice insurer where he was responsible for treasury, asset management and information technology.

Mr. Smereck has a BS in Managerial Finance, an MBA from the University of Nevada, Las Vegas, and an MS in Finance from the Carroll School of Management, Boston College.

Nathan Simon | Director | Strategic Asset Alliance

Nathan Simon was named Director in January 2021. Prior to being named Director, Mr. Simon was responsible for assisting with all investment manager research and evaluation, performance analysis & review, and investment modeling conducted for SAA's clients.

Mr. Simon graduated from the University of California, Berkeley in Spring 2013, with a degree in Political Economics. At Berkeley, he managed assets for the Berkeley Investment Group.

Peter Cornax | SVP – Senior Insurance Investment Strategist | AllianceBernstein

Peter Cornax is a Senior Vice President, Senior Investment Strategist and Portfolio Manager of AB's Global Credit Strategies. In April 2017, he was named a Senior Investment Strategist, focused on advising global insurers on strategic asset allocation and multi-sector/asset-class relative value. Cornax has been a member of the Global Credit and Insurance Asset Management teams since he joined AB in 2001. Over that time, his primary focus has been on managing fixed-income portfolios for insurance and financial institutional clients in Europe, the US and Asia. Cornax specializes in incorporating regulatory and accounting considerations with traditional economic analysis. Prior to joining the firm, he worked in the Claims Management Division at State Farm Insurance. Cornax holds a BS in business administration from Marist College School of Management.

Charles Dudley | Head of Private Credit US | Allianz Global Investors

Mr. Dudley is managing director, Head of U.S. Private Credit at Allianz Global Investors. He was previously managing director, Private Placements at Allianz Investment Management before his current appointment in January 2017. Previously with the firm, Mr. Dudley was with Allianz of America, a subsidiary of Allianz Europe B.V, where he was most recently managing director, Private Placements after serving as the sole portfolio manager for high yield securities from 1998 until 2011. He has more than 30 years of investment industry experience. Before joining Allianz in 1998, Mr. Dudley was a portfolio manager of high yield at Fortis Securities. Prior to that, he held a similar position at Sun America Asset Management. He began his career analyzing equities and fixed income securities. Mr. Dudley has a B.A. in history from Yale University and a J.D. from Georgetown University Law Center.

Eric Stein | CFA | Chief Investment Officer – Fixed Income | Eaton Vance Management

Eric Stein is a vice president of Eaton Vance Management and chief investment officer, fixed income. He is responsible for overseeing the management of investment strategies for Eaton Vance Management and its brand Calvert Research and Management across the income markets, including floating-rate loans, high-yield bonds, municipal bonds, emerging-market debt, mortgage-backed and asset-backed securities, investment-grade corporate and government bonds, and multi-asset income solutions for individual and institutional accounts. He originally joined Eaton Vance in 2002 and rejoined the company in 2008.

Eric began his career in the investment management industry with Eaton Vance in 2002. Previously at Eaton Vance, he was co-director of global income and a portfolio manager on Eaton Vance's global income team, where he led that team with investment professionals based in Boston, Washington, D.C., London and Singapore. Eric previously worked on the Markets Desk of the Federal Reserve Bank of New York. He has additional experience at Citigroup Alternative Investments.

Eric earned a B.S., cum laude, from Boston University and an MBA, with honors, from the University of Chicago Booth School of Business. He is a term member of the Council on Foreign Relations. He is also a CFA charterholder and a member of the Boston Committee on Foreign Relations, Boston Economic Club, Business Associates Club, Enterprise Club, AEI Boston Council and the CFA Society Boston. Eric is on the board of overseers of Big Brothers Big Sisters of Massachusetts Bay, where he is also a member of the finance and audit committee.