

## Steven J. Leifer, JD, CPA



### Vice President Technical Services

Steven is Vice President Technical Services of NYL Executive Benefits LLC (NYLEX Benefits), a subsidiary and the executive benefits consulting arm of New York Life Insurance Company, a Fortune 100 company. New York Life is the largest mutual life insurance company in the United States, with an enviable 163-year history. New York Life, combined with its affiliates, had \$280 billion in assets under management at December 2007, \$12 billion of surplus and 2007 GAAP total revenue of \$21.1 billion.

New York Life has among the highest ratings from the leading independent ratings agencies, including (at December 2007) A.M. Best (A++), Moody's (Aaa), Standard and Poor's (AAA) and Fitch (AAA) for financial strength. NYLEX Benefits specializes in the design, implementation, financing and providing of ongoing administrative support of supplemental executive benefits programs.

Prior to NYLEX Benefits, Steven served as Senior Counsel of Clark/Bardes Partners, the successor to Insurance Alliances Group, Inc. Prior to joining Insurance Alliances Group, Steven was a partner at Ernst & Young LLP, where he spent most of his professional career. His responsibilities at Ernst & Young included serving as Director of Tax for the firm's New York Region and as Associate Director and Director of International Tax Services. He has extensive experience in advising companies and individuals on identifying, developing and implementing creative business, transaction and tax strategies.

Steven is a graduate of Baruch College, received his J.D. from Columbia Law School and LL.M. (Taxation) from New York University School of Law. He is licensed as a CPA in New York and Connecticut and is a member of the New York State Bar. Steven serves in a number of other leadership roles, including:

- Member of the Board of Directors of the Orchestra of St. Luke's
- Member of the Board of Directors of the Greenwich Symphony

Steven has served in other professional and business roles, including:

- Chairman of the AICPA Tax Policy and Simplification Committee
- Chairman of the New York State Society of CPAs Committee on Relations with the IRS
- Chairman of the AICPA Task Force on Taxation of Electronic Commerce
- Member of the AICPA Task Force on Taxation of Split-Dollar Life Insurance
- Member of the Board of the National Foreign Trade Council

