



financial life

2026 Board of Directors

BIOGRAPHIES



CHIEF EXECUTIVE OFFICER, 1891 FINANCIAL LIFE

Lisa Bickus

Biography: Lisa Bickus is the Chief Executive Officer of 1891 Financial Life, a not-for-profit fraternal benefit society based in Schaumburg, Illinois. With more than 20 years of experience in financial services and insurance, she has led the organization's transformation through innovation, modernization, and a strong commitment to its mission and members.

Since joining 1891 Financial Life in 2014, Lisa has advanced from National Treasurer to COO, and now CEO, implementing digital platforms, enhancing compliance, and driving operational excellence. Her leadership is defined by transparency, inclusion, and a servant-leadership approach that inspires growth and collaboration.

A passionate advocate for women's financial empowerment, Lisa launched the "Financially Fearless" educational series and lives by the mantra of a "Fearless Lifestyle." She was named a 2025 InsurTech Hartford Making Waves Award winner for Innovation Excellence in Life Insurance.

Lisa holds a B.S. in Finance and Management from Northern Illinois University and serves on the boards of NAIFA Illinois and the American Fraternal Alliance. In her free time, she enjoys golfing, gardening, and spending time with her family in Florida.



BOARD OF DIRECTOR, 1891 FINANCIAL LIFE

Anne Blocker MS, RDN, CSSD, LD, CEDS, CDCES

Biography: Anne Blocker is a dietitian and author. She serves as the Executive Director for the Ellyn Satter Institute (a non-profit organization whose mission is to help improve people's lives through joyful and confident feeding and eating) and maintains a private nutrition counseling practice. To inform her work, she holds specialty certifications in eating disorders, sports nutrition, and diabetes. For the past 39 years she has been helping people live healthier and happier lives by breaking free of rigid feeding and dieting practices and developing a trusting relationship with food and their bodies.

Her professional career has included wellness work for Luther College, departmental management and clinical work with rural hospitals, consulting, community public health nutrition, college teaching, and national speaking.

Anne is an active member of St. Patrick Parish in Waukon, Iowa. She serves as a Eucharistic Minister, participates in and supports parish activities, and has served on the school board for St. Patrick Catholic school and as a Confirmation facilitator. She is a current member of the Waukon Park, Rec and Wellness board. Anne is passionate about actively strengthening local communities, and creating avenues in which people can support one another and give back to better the future.

Aside from professional interests, she loves hiking in beautiful northeast Iowa, Minnesota lake time, traveling, cooking, gardening, photography, and spending time with her fun-loving, adventurous family, including three adult children, a son-in-law, and an amazingly supportive spouse.



BOARD OF DIRECTOR, 1891 FINANCIAL LIFE

John Thomas "Tom" Burkhard Jr. CLU, ChFC, CFP (Incumbent)

Biography: I was born in Pittsburgh, PA in January 1959. I am the oldest of 5 siblings. I attended Catholic grade school for 5 years. I then attended the local public middle school and high school.

Upon graduation from high school, I attended Allegheny College in Meadville, PA, a small liberal arts college, where I earned a BS in Economics. I embraced the liberal arts approach to education. I enjoyed learning how to think critically, approach learning from a multi-disciplinary perspective and how to communicate in both the spoken and the written word. In addition, I was an active member of my fraternity serving as rush chairman and President. The best and most important achievement from my college experience is that I met my wife of over 40 years. She is my best friend and my life partner.

Together Cindy and I raised three amazing daughters. Our oldest is married, the mother of our first grandchild and is a Partner with Boston Consulting Group. Our second daughter is an elementary school special-ed teacher and is a Board Certified Behavioral Analyst. She works with young children on the spectrum. Our youngest daughter is a kindergarten teacher and loves making a positive impact on her little 5 year olds. We are very proud of all of them.

After leaving Pittsburgh in 1995, we lived and worked in Washington DC, Cincinnati, Tokyo Japan (our two eldest graduated from high school while there), Houston, Indianapolis, Lincoln and New Haven. Shortly after I retired, Cindy and I moved to St. Augustine.

Professionally I have had the opportunity to work in all aspects of an insurance company, meet many new people and be exposed to many different approaches. You could say that I have had a liberal arts experience in my professional career.

We are extremely blessed. It has been an incredible journey, very interesting and rewarding. Now it is time to give back.



BOARD OF DIRECTOR, 1891 FINANCIAL LIFE

Jeanne Monica Filipp CPA, CPCU (Incumbent)

Biography: My name is Jeanne Filipp, CPA, CPCU. I have been a member since 2008, and am a founding and active member of the Home Office's Impact Team. My connection with 1891 Financial Life began in 1998 as Controller/Director of Accounting and Finance, where I guided our financial success for 11 years, securing improved Surplus and Audit results.

I returned as a Board Director from 2014-2018 and again from 2022-present, serving as your Board Audit Committee Chair throughout.

I have 35+ years' experience in the Insurance Financial industry, including 16 years at Allstate, advancing to Division Director. At a regional insurer, I was the CFO, Treasurer and Board Director. Lastly, I was Assistant Vice-President & Controller at W.R. Berkley Inc., a Fortune 500 international insurer. Most recently, I worked there as part-time Senior Financial Analyst until retirement in 2020.

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My family includes my husband Bob of 45 years, three daughters and sons-in-law, and six grandchildren. I was raised in a traditional Catholic family — one of nine children — in a blue-collar Chicago suburb. I attended Catholic schools through 12th grade, instilling the foundation of my lifelong record of service. I am currently in my Parish's Choir, Women's Faith and Service groups, and Eucharistic Ministries. I will keep 1891's Catholic mission as my guide in Board matters.

My 1891 history, professional experience, and CPA and CPCU credentials make me uniquely qualified to provide continuity for our Board.



BOARD OF DIRECTOR, 1891 FINANCIAL LIFE

Paul Kessler

Biography: Paul Kessler is Managing Director of the Altus Group, a consulting firm specializing in increasing individual, team, and organizational performance. As an expert in the forces of industry disruption, he helps organizations define strategic direction in increasingly volatile, uncertain, complex, and ambiguous business environment conditions. He has worked with many leading organizations to define, develop, and execute their strategic direction, vision and goals. He has expertise in organizational transformation, design and performance, strategic planning, leadership development, executive coaching, team effectiveness, group process and facilitation, and change management.

After serving in the United States Naval Air Department, Mr. Kessler received his B.A. in psychology from Franciscan University of Steubenville. He completed his M.A. in Industrial/Organizational Psychology at the University of New Haven.

He is a co-author of *Leading at the Edge: Leadership Lessons from the Extraordinary Saga of Shackleton's Antarctic Expedition*, which summarizes 25 years of research on individuals and teams attempting to perform at "The Edge" — the highest possible levels of performance. His passion to understand "The Edge" has taken him to disparate places — to Antarctica, where he retraced the footsteps of famed explorer, Ernest Shackleton, to Australia, where he sailed with the crew of the *Midnight Rambler*, winners of the treacherous 723-mile Sydney-Hobart Race, and to the top of Mount Rainier — the most heavily glaciated peak in the contiguous United States — to push his own physical limits to "The Edge".

Mr. Kessler has co-authored articles including *Leadership Lessons from the Race to the South Pole*, *Decision Making at the Edge*, and *Using the Power of Resonant Metaphor to Increase Leadership Effectiveness*.

His focus is on helping organizations to define strategy and increase performance under conditions of adversity and rapid change. He works across a range of industries, environments, nationalities and companies, ranging from the Fortune 100 to non-profits as well as closely held family-owned businesses. He is a Galliard Institute certified family business advisor, a featured speaker at conferences around the world and resides in Connecticut, U.S.A.



BOARD OF DIRECTOR, 1891 FINANCIAL LIFE

Gregory J. O'Brien CLU, CLF, FIC

Biography: Greg O'Brien is a seasoned financial services executive with more than four decades of experience in insurance, investments, agency leadership, and regulatory compliance. He began his career with Modern Woodmen of America, where he developed a strong appreciation for the fraternal model and its mission-driven approach to serving members.

After seven years at Modern Woodmen, Greg was recruited to Prudential, where he served for 22 years as Managing Director in the Chicago area. In that role, he was responsible for agency development, advisor leadership, and all aspects of insurance and investment operations. He later founded his own agency, Financial Group of Illinois (FGI), achieving MDRT status in 2008, and was subsequently recruited by Mutual of Omaha to build and lead an agency in Illinois. He later returned to private practice while continuing to operate his independent agency.

Throughout his career, Greg has served as a registered principal for both Prudential and Mutual of Omaha, with extensive experience in compliance, risk oversight, and the governance of insurance and investment products. He brings a practitioner's perspective to board service, with deep insight into distribution strategy, advisor recruitment, marketing, and multi-channel growth, including captive, contracted, and brokerage models. His leadership philosophy is grounded in servant leadership, ethical decision making, and long-term sustainability.

In addition to his professional experience, Greg has a strong record of community and nonprofit leadership. He has served as President of the Lamoine Valley Life Underwriters Association, Vice President of the Macomb Jaycees, Chairman of the Board of the Walnut Creek YMCA, and Chair of the Sigma Phi Epsilon Alumni Board at Western Illinois University. He is an active parish member and longtime volunteer, including service with SCORE mentoring entrepreneurs and Junior Achievement financial literacy programs in Chicago Public High Schools.

Greg is motivated to reengage with a fraternal organization whose mission aligns closely with his personal values, professional experience, and lifelong commitment to service. He brings strategic insight, operational expertise, and a collaborative board presence dedicated to advancing member value and organizational growth.



BOARD OF DIRECTOR, 1891 FINANCIAL LIFE

Mary Tone Rodgers DPS, CFA (Incumbent)

Biography: After childhood in Chicago's South Side, and with the assistance of a scholarship from 1891 Financial Life, then known as the National Catholic Society of Foresters, I graduated from Carleton College in Northfield MN with a bachelor's degree in economics, from Northwestern University in Evanston IL with an MBA in finance, and from Pace University in New York City with a doctorate in finance. I worked as an industry analyst in East Chicago's Inland Steel (now Cleveland Cliffs), spent decades managing portfolios at Merrill Lynch, and most recently teach finance and economics at the State University of New York. I published my first book this year about financial crises during the early years of our country.

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Securing my Chartered Financial Analyst (CFA) professional credential in 2005, I've helped to educate the next generations of savers, investors and financial leaders, sharing my experience at building, managing and overseeing large portfolios. Being a policy holder for over forty years, it is an honor to serve now on 1891's Board as a member of the Audit and Finance & Investment Committees. It's an opportunity to give back to the fraternal organization that helped my family attain financial security. Volunteering in my parish, Sacred Heart of Tampa, and in my profession are priorities for me.

My husband of 35 years designs and builds sailboats, and I teach in the State University of New York's online MBA program. We spend our summers with family on Lake Huron, volunteering together with the local Youth Sailing program.



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Wesley Skillett CPA

Biography: Wesley started his professional accounting career as an audit associate with KPMG in 2013, after earning his accounting degree from the University of Nebraska-Lincoln as well as a philosophy degree from St. Gregory the Great Seminary. While at KPMG, Wesley obtained his CPA license in 2014 and participated in a global rotation which allowed him to work from the Dublin, Ireland office for two years.

He also earned the promotion to Audit Manager, and in this role he was responsible for managing numerous audit teams in the field; oversight of the individual engagement management including managing the budget, resourcing, billing and timelines; and maintaining and building client relationships. He spent one year at BerganKDV, also as an Audit Manager, working with local not-for-profit organizations and government entities.

Wesley left to pursue an opportunity as Director of Accounting at Applied Underwriters. In his role, his duties included liaising with the external auditors, providing accounting expertise internally, assisting with the quarterly financial reporting and review process, supervising and managing the reinsurance accounting team, and selection and implementation of new reinsurance administration software.

In March of 2024, he was offered a new position which aligned better with the needs of his family and joined Prairie Mechanical Corporation as the Financial Controller. After one year he was promoted to CFO and now leads and manages the Company's strategic and financial operations.



BOARD OF DIRECTOR, 1891 FINANCIAL LIFE

Carole Witkowski (Incumbent)

Biography: Carole Witkowski is a life-long member of 1891 Financial Life, growing up in the court system of NCSF at St. Florian Parish. She has been uniting her leadership skills and service focus throughout her life — in school, parish, work, and community.

Carole was married for 35 years before being widowed in 2019. She remarried in June 2024 to Jaimie Faulkner. Together, they have a stepson, daughter-in-law, and two beautiful grandchildren. Never

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having children of her own, Carole has remained close to her siblings, nieces, and nephews. She currently lives in New Berlin, WI, and belongs to St. John Vianney Parish.

Her experiences with her family, parish, and community have shaped her approach to the workplace. Carole retired after more than 30 years in Human Resource Management within fast-growing small and mid-sized companies. Through her consulting business, she continues to support individuals and organizations with leadership coaching, succession planning, assessment facilitation, and training workshops. Her passion is helping individuals be the best version of themselves. Much of her work is unpaid services to students and small business owners. Carole brings her experience and passion to the 1891 Financial Life Board in an effort to support the CEO and management team.

Carole is certified as an Associate Certified Coach (ACC) through the International Coaching Federation. She holds a master's degree in Adult Education-Organizational Development from Alverno College in Milwaukee, WI.



1891 Financial Life is authorized to conduct business in CA, CO, IL, IN, IA, KS, MI, MN, MO, MT, NE, ND, OH, OR, SD, WA, WI. DBA Oregon: **1891 Financial Life Insurance**. DBA California: **1891 Financial Life, A Fraternal Benefit Society**. Products are available to applicants who meet membership, insurability, U.S. citizenship, and residency requirements. Not all products described are available in all states. Guarantees are backed by the financial strength and claims-paying ability of the Organization.