

Navigating Change Together

Wyndham Grand Harbourside Place, Jupiter, FL | Feb. 1-3, 2023

Navigating Change Together

The theme of the 2023 LIC Annual Conference is **Navigating Change Together**. There's no better place than LIC for networking with peers at similar companies to hear thought-provoking speakers, plan for the challenges and opportunities of the coming years, and discuss practical solutions. Hear unique perspectives on growth and innovation, and engage in interactive sessions designed to give you practical ideas to help your company succeed.

AGENDA & PRELIMINARY ATTENDEE LIST

Wednesday, February 1, 2023

6:00-7:00 p.m. **Opening Reception & Registration**

7:00 p.m. **Dinner on Your Own**

Thursday, February 2, 2023

8:00 a.m. **Networking Breakfast**

8:30 a.m. **Welcome from LIC's Board Chair**
Francois Duguay, EVP & Chief Actuary, Optimum Life Re

8:45 a.m. **Keynote Address**
Are You Stuck In Business Purgatory? Escaping the Trap Between Success and Failure
David Segal, Founder of DAVIDsTEA and Mad Radish
Retail Visionary and Branding Expert

Building a successful business is amazing. Watching a business fail is hard – but honest failures can make you stronger. The worst fate in business, argues David Segal, the founder of DAVIDsTEA, is purgatory, when every day is a battle to make ends meet and gain an inch of ground.

As both an entrepreneur and an investor, David has experienced purgatory first-hand. And he's identified three primary causes of purgatory: your product, your people and your ego.

In this compelling talk, David takes audiences through the five criteria that make for a compelling product; the most important qualities to look for in your people (hint: it's not about skills or experience); and tips on how you can put your own ego aside to move your business forward. An energetic and passionate speaker, David brings his concepts to life with real-world examples, including tales from his own experience leading a \$200 million brand.

10:00 a.m. **Networking Break**

10:30 a.m. **Growing Distribution**
Duane Zappitelli, FIC, Vice President, Sales and Distribution, Serenia Life Financial

A case study presentation on Duane's experience at Serenia Life, growing their independent distribution channel to spark impressive growth through a name change, technology updates, product enhancements, and cultural changes. A remarkable story of transformation.

Pre-Meeting Event

LIC CEO Forum

Wyndham Grand Harbourside Place, Jupiter, FL
January 31 – February 1, 2023

Life insurance company CEOs and Presidents are invited to network and discuss strategic issues and solutions one day before the LIC Annual Conference.

More Info: www.loma.org/LICCEO



Francois Duguay



David Segal



Duane Zappitelli

11:15 a.m. **Developing a Customer Experience Strategy**
Paul Mlodzik, Marketing, Brand and CX Executive, Mlodzik Consulting

Paul Mlodzik has spent the past 20 years of his career helping insurance organizations achieve industry-leading CX results. In this presentation, he will share some best practices and insights for companies—of any size—to build a CX strategy that works for them.



Paul Mlodzik

12:00 p.m. **Networking Luncheon**

1:00 p.m. **Insurance CEO Case Study**

Rear Admiral Brian E. Luther, USN (Ret.), President & CEO, Navy Mutual Aid Association



Brian Luther

2:00 p.m. **Networking Break**

2:15 p.m. **Navigating Change Together:
Facilitated Discussion with Live Polling**

Participants set the agenda for Facilitated Discussion with live polling. This is a unique opportunity to delve into shared challenges and practical solutions with leaders of similar small-to-midsize life insurance companies. Here are some of the topics discussed at the last LIC Annual Conference:

- What are other companies' greatest challenges in the coming year?
- What other companies are doing/planning to do with AI, automated underwriting, and user experience
- 3-5 year product development opportunities/challenges
- Distribution challenges and strategies to address them
- Hiring trends, pay rate competition, challenges finding people, the Great Resignation, remote work
- How can my company get more out of our investment portfolio?
- What strategies are companies using to address the current economic trends?

3:30 p.m. **Sessions Adjourn for the Day**

6:00 p.m. **Networking Reception**

6:30 p.m. **Annual Membership Banquet**

to 8:30 p.m. *Sponsored by Our 2023 LIC Elite Conference & Banquet Sponsors*

LIC's traditional annual banquet is a chance to enjoy fine dining, develop old and new friendships in the industry, and hear a light-hearted State of the Association address as the leadership changes from outgoing LIC Chair Francois Duguay, Executive Vice President & Chief Actuary, Optimum Life Reinsurance, to incoming 2023 Chair Steve Shaffer, CEO, Homesteaders Life Company.

Thank you to our Banquet Sponsors!



Friday, February 3, 2023

8:00 a.m. **Networking Breakfast**

8:30 a.m. **Welcome from LIC's Incoming Board Chair**

Steve Shaffer, CEO, Homesteaders Life Company



Steve Shaffer

8:45 a.m. *Keynote Address*

David Ben: Creativity Expert & Master Magician

David Ben inspires people to strike the word “impossible” from their vocabulary. A master problem-solver, David uses his training as a former tax lawyer, a graduate of the London School of Economics, and a world-class magician to make perplexing problems in business simply disappear.



David Ben

Recognized among the world's premier magicians, David was the sole protégé of one of the greatest sleight-of-hand artists of the 20th century, and has performed throughout North America, Mexico, England, and Japan. He has also developed special effects for theatre, film, and television productions, written six books, set up a performing arts foundation, curated a major museum exhibition, and programmed performances for an international arts festival.

Described as “one of the most influential magicians of his generation” by the Financial Post, David loves to share his passion for creativity, problem solving, innovation and mentorship. He is the author of *Advantage Play: A Manager's Guide to Creative Problem Solving*.

10:00 a.m. **Networking Break**

10:15 a.m. **What's in Store for the Economy, the Markets, and Insurers' Portfolios**

Jean-Martin Aussant, Senior Vice-President, and Jan Erik Warneryd, CIO, Optimum Quantvest Corporation (OQC)

Recent economic events have made markets more uncertain than ever. This session will go over various fundamental economic indicators, discuss how to the markets as 2023 unfolds, and assess the consequences for insurers' portfolios.



Jean-Martin Aussant



Jan Erik Warneryd

approach

11:00 a.m. **Adjourn**

REGISTER AT:
www.loma.org/LIC2023

LIC2023 Jupiter: Preliminary Attendee List

As of 1/19/2023 (Sponsors Highlighted).

1891 Financial Life - Lisa Bickus, CEO

AAM - John Olvany, Principal, Bus. Development

AFR Life - Bernadette Autrey, CFO

AFR Life - Brandice Rhoades, AVP

AFR Life - Jon Srna, President & CEO

AFR Life - Mandy Coulter, Director of Life Operations

American Benefit Life - Bobby Pierce, SVP, Pre-Need

American Enterprise Group - Dave Munk, VP Product Solutions

American Fraternal Alliance - Allison Koppel, CEO

American Home Life - Steve Lobell, CEO

American Savings Life - Byron Allen, Pres/CEO

American Savings Life - Paul Whetten, EVP/COO

Arkell Consulting - Paul Mlodzik, Consultant

Atlantic Coast Life - Tom Holland, VP National Accts

Balanced Growth Consulting - Jason Bordui, Pres.

BetterLife - Craig Van Dyke, President/CIO

Boston Mutual - Linda Pierce, Dir. Implementation

Boston Mutual - Jennifer King, Vice President, EPMO,
Policy Holder Administration & Quality Center

Bruce & Bruce - Andrew Edelsberg, SVP/Bus. Strategist

Catholic Order of Foresters - Chris Nowotarski, Gen Couns

Catholic Order of Foresters - Greg Temple, Pres/CEO

Cincinnati Equitable Life - Tom Schrote, COO

Clearview Partners - Jim Kerley, Managing Partner

Columbian Financial Group - Mike Fosbury, CEO

Converge Re - Ari Lindner, CEO

CSA Fraternal Life - John Kielczewski, Pres/CEO

Cyrus Works - Chris Meredith, Chief Bus. Devel Ofcr

ELCO Mutual - Tim Heaton, Sr VP/Chf Strategy Ofcr

ELCO Mutual - Fred Wilmsen, VP Bus Development

Epoq - Clifford Cohen, Bus. Development Director

Exactuals - Sandy Dougherty, Dir. Ins & Corp Accts

First Consulting - Kathy O'Farrell, Reg Affairs Mgr

Friedland Consulting - Bruce Friedland, Principal

Gallagher Re - Cliff Jenkins Jenkins, Senior VP

Gallagher Re - Mary Broesch, Executive Vice President, Life Solutions Group

GPM Life - Peter Hennessey IV, Exec VP & COO

GPM Life - Jay Moyer, VP - Director of Marketing

Heritage Life - Pete McPherson, Senior VP

Homesteaders - Steve Shaffer, CEO

Homesteaders - Viktoria Denys, SR Document Management Specialist

Homesteaders - Dean Lambert, Vice President-Corporate Communications

iCover - Jim Sorebo, Chief Distribution Officer

illustrate inc - Lyndon Edwards, President

2023 LIC Annual Conference
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InsurTechNY - David Gritz, Managing Director

InsurTechNY - Tony Lew, Co-Founder/Managing Dir.

KBRA - Tina Bukow, Managing Dir., Business Devel

Kemper Life - Michael Wheeler, Divisional Vice President

KSKJ Life - Tony Mravle, CEO

Larson & Company - Diane Nesbit, Partner

Lavvi - Roddy Awad, Chief Executive Officer

LCBA Life - Doug Tuttle, President and CEO

Lewis & Ellis, Inc. - Jeff Lee, Vice President & Consulting Actuary

Liberty Bankers - Eric Johansson, EVP and COO

Liberty Bankers - David Vrla, Chief Actuary

Liberty Bankers - Dave Kessler, Sr. Vice President, Technology

Liberty Bankers - Todd Stone, SVP, HS Division

LIDP - Kimberly Duke, CMO & Vice President of Sales

Manage My Limited - Stuart Johnston, Chief Marketing Officer

Manage My Limited - Mark Moran, Chief Product Officer

MDI - Awais Shaikh, CEO

MRS - Chad Gracey, Senior VP, New Business Devel & Underwriting Svcs

MRS - Mike Cunningham, Vice President, Business Development

Modern Woodmen - Mark Singleton, Chief Strategy Officer

MVP Advisory Group - Mike Plazony, Partner, New Bus. Sales & Underwriting Practice Leader

Navy Mutual - Brian Luther, President & CEO

NEAM - Jeff Blanchard, New Business Development Professional

NEAM - Chris Lech, Head of Marketing & New Business Development

NSS Life - Al Burns, CIO

Optimum Quantvest - Mark McDonnell, Senior Portfolio Manager

Optimum Quantvest - Jean-Martin Aussant, Senior VP

Optimum Re - Francois Duguay, EVP & Chief Actuary

Parkway Advisors - Kyle Timmermann, VP Business Development

QLAdmin Solutions - Chris McCaul, President, CEO

QLAdmin Solutions - Greg Garza, CTO & Dir. Software Development

QLAdmin Solutions - Kat Correa, Chief Marketing Officer

Royal Neighbors - Karen Hayes, Operations Executive

Security National Life Ins. - Marty Rich, VP Director of Sales Operations

Serenia Life Financial - Duane Zappitelli, VP, Sales & Distr

Slovene National Benefit Society - Joe Evanish, CEO

SWBC Life - Joan Cleveland, President & CEO

TAI - Brian Traxler, SVP, Business Development

Tapp Solutions - Michael Potter, CEO

Teachers Life - Martha Turner Osborne, Chief Marketing and Sales Officer

Texas Service Life - Susan Thomas, CEO

thinktum - Eugene Shafrofsky, Head of Strategy

thinktum - Paul Reaburn, CFO

thinktum - Thomas Phillips, Dir. Underwriting Innovation & Integration (US)

thinktum - Annie Chu, AVP, Strategic Patnerships

Trilogy Actuarial Solutions - Josh Gerdes, Founding Partner

Trilogy Actuarial - Amy Phillips, Partner

TruStage - Tammy Schultz, President, Preplanning Solutions

zinnia - Tom Spencer, SVP Business Development