



2022 LIC Final  
Expense Workshop  
**Managing Final  
Expense Profitability**



**Hosted by Optimum Life Reinsurance**

Marriott Dallas Las Colinas | June 8-9, 2022

Registration & Information: [www.loma.org/finalexpense](http://www.loma.org/finalexpense)

## **AGENDA & SAMPLE ATTENDEE LIST**

Anti-Trust Policy: [www.loma.org/Antitrust](http://www.loma.org/Antitrust)

### **Wednesday, June 8, 2022**

2:00 p.m. **Welcome & Attendee Introductions**

2:45 p.m. **Final Expense Facilitated Discussion**

*Jeff Shaw, CLU, ChFC, Executive Director, Life Insurers Council*

*The number-one value cited by LIC conference attendees is the ability to participate in open discussions with peers. Get live feedback from the group on your most pressing questions. Submit topic requests in advance, for a discussion about everything you always wanted to know about Final Expense but never had the opportunity to ask.*

*Topics requested so far include: Mitigating Fraud, Automated Underwriting, Adjustments Based on A/E Mortality Results, Emerging Trends & Current Issues in Final Expense, Digital Sales, Conservation Efforts, Mortality Experience, Managing Risk of Existing and New Business, Product Development, etc.*

4:15 p.m. **Sessions Adjourn for the Day**

6:30 p.m. **Networking Dinner**

*Hotel Guests: Meet in lobby at 6 p.m. for transportation to dinner.*

### **2022 LIC FINAL EXPENSE WORKSHOP SPONSORS**





## Thursday, June 9, 2022

- 7:30 a.m.      **Continental Breakfast**
- 8:30 a.m.      **Optimum Life Re Mortality Study Using Predictive Modeling**  
*Fred Beaulieu, FSA, Director, Optimum Life Re*
- 9:45 a.m.      **Mortality & Lapse Studies**  
*Amy Phillips, ASA, Partner, Trilogy Actuarial Solutions*  
*Jill Thompson, FLMI, AALU, ACS, HIA, Underwriting Director, Optimum Life Re*  
*Hear the highlights of Trilogy Actuarial Solutions final expense mortality and lapse studies and discover the benefits it can have for your company*
- 10:45 a.m.      **Break**
- 11:00 a.m.      **The Future of Life Insurance Distribution**  
*Jake Tamarkin, CEO, Everyday Life Insurance Company*  
*In this provocative interactive session, we'll debate the future of distribution. How are technology and demography colliding in a way that impacts consumer buying preferences and traditional distribution? Where are the opportunities and how can forward-looking insurers capitalize on them? Facilitated by Jake Tamarkin, CEO of the rapidly growing insurtech distribution platform Everyday Life.*
- 12:00 p.m.      **Networking Luncheon**
- 1:00 p.m.      **Final Expense Case Study: KSKJ and iCover**  
*Stuart Buchanan, COO, KSKJ Life; Hari Srinivasan, Founder & CEO, iCover; and Nicole Mwesigwa, Co-Founder & COO, iCover*  
*The case study will focus on how KSKJ was able to digitally transform their Final Expense sales and new business program in 3 months, the elements of success and the new opportunities resulting from the effort.*
- 1:45 p.m.      **LIC Final Expense Survey Report**  
*Jeff Shaw, CLU, ChFC, Executive Director, Life Insurers Council*  
*Be one of the first to hear the highlights of LIC's annual Final Expense Survey Report with the added benefit of discussing some of the implications of the results with your peers.*
- 2:15 p.m.      **Adjourn**

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## Preliminary List of Registrants (as of 5/25/22)

Aetna, Inc. - Scott Root, Lead Director, Product Management / Development  
AIG - Patrick Alvarez, Market Manager, Transactional Markets  
AIG - Vernon James, Market Manager  
American Enterprise Group – Great Western Insurance Co. (GWIC) - Dave Munk, VP Product Solutions  
Amerilife Group, LLC - Eric Brennan, Vice President of Life and Health  
Amerilife - David Paul, National Director of Simplified Issue Life  
Baltimore Life - Mark Brandt, AVP, Market Research and Development  
Bankers Life Insurance Company of America - Louis Bickel, President  
Breathe Life - Mike Beaulieu, Director of Sales  
Columbian Financial Group - Kelly Klink, Assistant Vice President, Corporate Projects and Customer Service  
Columbian Financial Group - Tariq Hussain, 2nd VP Actuary and Data Analysis  
Epoq - Clifford Cohen, Business Development Director  
Everyday Life - Jake Tamarkin, CEO  
ExamOne - Brian Lanzrath, Dir. of Analytics  
Friedland Consulting Services, LLC - Bruce Friedland, Principal  
Globe Life Insurance Company - Alan McLemore, Senior Director, Actuarial  
Hannover Life Reassurance Company of America - Ryan Kirwin, Sr. Actuarial Associate  
iCover - Nicole Mwesigwa, COO  
iCover - Hari Srinivasan, CEO  
iPipeline - Joe Paddock, Vice President, Sales  
iPipeline - Naish Berran, Sales Director  
KSKJ Life - Stu Buchanan, COO  
LexisNexis Risk Solutions - Andrea Overholser, Senior Manager, Strategy & Innovation - Life  
LexisNexis Risk Solutions - Scott Rhinehart, Sr. Manager, Strategy & Innovation - Life  
LIC - Jeff Shaw, Executive Director  
LIC - Audrey Wittenburg, Associate Director  
Lincoln Heritage Life Insurance - Monica Sole, Vice President, Government & Industry Relations  
Milliman, Inc. - Bill Mehilos, Principal & Consulting Actuary  
Milliman, Inc. - Al Klein, Principal and Consulting Actuary  
Mutual of Omaha - TJ Crane-Falque, Actuary  
Old American Insurance - Blake Bixby, Director of Agency Services  
Old American Insurance - Brad Cope, VP Sales & Marketing  
Parkway Advisors - Theron Holladay, President / CEO  
Reinsurance Group of America - Friday Friday, Executive Director, Business Development  
RGA - Scott Grandmont, Vice President, Underwriting Solutions  
RGA - Brian Sibley, VP, Business Development  
Royal Neighbors of America - Karen Hayes, Operations Executive  
Security National Life Ins. - Guy Winstead Winstead, VP  
Security National Life Ins. - Marty Rich, VP Director of Sales Operations  
Swiss Re - Seb Kleber, In Force Solutions Manager  
thinktum - Paul Reaburn, CFO  
thinktum - Eugene Shafronsky, Head of Strategy  
Trilogy Actuarial Solutions - Douglas Brown, Founding Partner  
Trilogy Actuarial Solutions - Amy Phillips, Partner  
Trinity Life Insurance Company - Alvin Begnoche, Vice-President, Marketing