



Enterprise Risk Management for Smaller Companies



LIC Enterprise Risk Management Committee Meeting

Hosted by



- Meeting Dates:** May 10-11, 2022 (*Remote: Wednesday May 11, 9am-2pm CDT / 10am-3pm EDT*)
- Meeting Location:** American Farmers & Ranchers Life, 4400 Will Rogers Pkwy, Oklahoma City, OK 73125
- Recommended Hotel:** [Embassy Suites Will Rogers Airport](#), 1815 S Meridian Ave, Oklahoma City, OK 73108
Phone: 405-682-6000 (\$101 American Farmers & Ranchers Mutual Insurance Company Rate)
- Registration Info:** www.loma.org/LICERM **Sponsorship Info:** www.loma.org/LICSponsorships

AGENDA & PRELIMINARY ATTENDEE LIST

Tuesday, May 10, 2022

6:30 p.m. CDT **LIC Networking Dinner**
[Charleston's Restaurant OKC Meridian](#), 2000 S Meridian Ave – hotel guests meet in lobby at 6:15 p.m. to carpool.

Wednesday, May 11, 2022

7:30 a.m. **Breakfast at Embassy Suites** (hotel guests)

8:30 a.m. CDT **Remote Attendees: Webex Check-In**
The virtual portion of the meeting will be online 30 minutes early so you can check audio and video and catch up with your colleagues. See www.loma.org/webex for tips.

8:45 a.m. CDT **Meet for Carpools**
 Hotel guests meet in lobby to carpool to American Farmers & Ranchers Life, 4400 Will Rogers Pkwy.

9:00 a.m. CDT **Welcome & Attendee Round Robin** (*Remote Attendees Included*)
 Each attendee will share their most important current initiatives/challenges.

9:45 a.m. CDT **ERM Case Study** (*Remote Attendees Included*)
 Hear about American Farmers & Ranchers' ERM program development journey and lessons learned.

10:30 a.m. CDT **Structuring ERM Program at Smaller Companies: Best Practices & Discussion**
(Remote Attendees Included)
 Michael Cohen, MBA, Principal, Cohen Strategic Consulting

11:30 a.m. CDT **Facilitated Discussion with Live Polling** (*Remote Attendees Included*)
 Participants submit questions for the group to answer on the polling software, view response data onscreen, and do a deeper dive in open discussion. Find out what others are doing, what works and what doesn't, and discuss common challenges.

12:00 p.m. CDT **Office Tour & Networking Luncheon Hosted by American Farmers & Ranchers Life**

1:00 p.m. CDT **Facilitated Discussion (continued)**

2:00 p.m. CDT **Adjourn**

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PRELIMINARY LIST OF ATTENDEES

American Farmers & Ranchers Life Insurance Company - Brandice Rhoades, AVP
American Farmers & Ranchers Life Insurance Company - Jon Srna, President & CEO
American Farmers & Ranchers Life Insurance Company - Mark Hayhurst, PMP, Director, Strategic Planning & Operations
American Savings Life Insurance Company - Michael Frahm, MBA, CFP, CLU, CCP, FLMI, Vice President
Assured Life Association - Diane Muller, FLMI, ACS, Secretary/VP of Operations
Assured Life Association - Jerome Christensen, ACS, FLMI, Vice President
Baltimore Life Insurance Co. - Stephen Vincent, FSA, MAAA, CLU, ChFC, AVP
Catholic Order of Foresters - Matt Korienek, ASA, MAAA, Senior Product Actuary
Catholic United Financial - Kelly Bretz, FSA, MAAA, CFA, Director of Enterprise Risk Management
Cohen Strategic Consulting - Mike Cohen, MBA, Principal
Columbian Financial Group - Simone Davis, FFA, FSA, CERA, MAAA, SVP, Chief Actuary and CRO
ELCO Mutual Life and Annuity - Jeffrey Rasmus, FLMI, AIRC, ARA, ACS, Vice President/CCO
ELCO Mutual Life and Annuity - Silvio Rodia, VP/CRO
GPM Life - Wallace Taylor, FALU, CLU, ChFC, FLMI, AIRC, ACS, Vice President, Corporate Underwriting Officer
Heritage Life - Monica Sole, FLMI, ACS, AIRC, ARA, Vice President, Government & Industry Relations
Homesteaders Life - Judith Naanep, FSA, MAAA, CERA, VP Actuarial Services
iPipeline - Joe Paddock, Vice President, Sales
LIC - Audrey Wittenburg, ALMI, ACS, Associate Director
LIC - Jeff Shaw, CLU, ChFC, Executive Director
Lincoln Heritage Life Insurance - Monica Sole, FLMI, ACS, AIRC, ARA, Vice President, Government & Industry Relations
Parkway Advisors - Kyle Timmermann, Director of Consulting
Physicians Mutual - Mark Nelson, FSA, MAAA, CERA, VP Enterprise Risk Management
Teachers Life - Cherisse Norman, MBA, CPA, CMA, Chief Financial Officer/Chief Risk Officer
Trilogy Actuarial Solutions - Amy Phillips, ASA, Partner
Trilogy Actuarial Solutions - Douglas Brown, ASA, MAAA, Founding Partner