



Strategies for Small Company Investment & Capital Management



LIC Investment Committee Meeting

Hosted by Catholic Order of Foresters | Naperville, IL | October 18-19, 2023 | www.loma.org/LICINV

PRELIMINARY AGENDA / ATTENDEE LIST

Wednesday, October 18, 2023 Carpools depart from Marriott lobby at 1:45 pm. Remote participant check-in at 1:45 pm CT / 2:45 ET

2:00 pm CT Welcome & Attendee Introductions/Activity Reports

What's the most important news in your life today, personally and professionally? Hear what's going on at other companies and get to know your fellow Investment executives.

2:30 pm CT Commercial Real Estate Lending Opportunities for Small-to-Midsize Insurers

Peter Mavrogenes, CEO & Managing Director, Innovative Capital Advisors

Peter has over 20 years of insurance asset management experience. Prior to the formation of ICA, Peter was a founder and Chief Investment Officer at Asset Allocation & Management Company where he had overall responsibility for \$11 billion of insurance company assets, and was directly responsible for \$6 billion (over half) of AAM's assets in his dual role as Senior Portfolio Manager. He specialized in senior structured assets including MBS, ABS, and CMBS sectors and has been a specialist in interest sensitive liabilities including annuities and universal life products.

3:30 pm CT NAIC Capital Markets

Andrew Edelsberg, CPA, FLMI, SVP-Business Strategist, Bruce and Bruce

Recent and upcoming changes to investment reporting, ratings, etc. Andrew is a rating agency analyst/manager with focus on U.S. life, annuity, health and employee benefits companies; his experience in the industry includes over 22 years with three NRSROs.

4:30 pm CT Adjourn for the Day

6:30 pm CT Hosted Networking Dinner at Rosebud

22 E Chicago Ave, Naperville, IL (Carpools leave from the hotel lobby at 6:00 p.m.)

Continued

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Thursday, October 19, 2023

8:30 am CT **Continental Breakfast** Carpools depart from Marriott lobby at 8:15 am. Remote participant check-in at 8:15 am CT / 9:15 ET

9:00 am CT **Economist Insights**

John Tuohy, CEO, SWBC Investment Services

Hear about the market environment and some unique funds for institutional investors. As an investment management executive leader, John is passionate about increasing revenue, market share, profit margin, and return on investment. He has over 20 years of experience in leadership, strategy, execution, capital raise, fund launch/management, alternative investments, business development, operations efficiency, wealth management and successful team based approach to business. He is a data-driven focused visionary who closely watches trends, studies macro-and-micro economic trends, and sees now what others see later.

10:00 am CT **Investment & Capital Management Facilitated Discussion**

Participants submit topics in advance for group discussion with live polling. Requested so far:

- Planning for recession - the end of the inversion, effect on a company's portfolio
- Finding yield/risk value in the current environment
- Forward looking perspectives on interest rates
- New/unique asset classes to be considered
- Strategies for managing more than one investment manager
- Portfolio Allocations
- NAIC regulatory initiatives, Bond Project
- Negative IMR
- Rating agency views of investments

11:30 am CT **Hosted Networking Luncheon**

12:30 pm CT **Adjourn**

PRELIMINARY ATTENDEE LIST (as of 10/3/2023)

Allen Bailey & Associates - Tom Wurfel, President (Remote)
American Fraternal Alliance - Allison Koppel, CEO
American Savings Life Insurance Company - Byron Allen, President/CEO
American Savings Life Insurance Company - Paul Whetten, EVP/COO
AQS Asset Management - Stephen Gonzalez, Portfolio Manager
Baltimore Life Insurance - Mark Glickman, Vice President, Business Intelligence
Bruce & Bruce - Andrew Edelsberg, SVP - Business Strategist
Catholic Life - Christopher Belz, Executive Vice President/Corporate Relations
Catholic Order of Foresters - Benjamin Guzman Jr, Portfolio Manager - Private Placements & Real Estate
Catholic Order of Foresters - Greg Temple, President and Chief Executive Officer
Catholic Order of Foresters - Laura Stanek, Portfolio Manager
Catholic Order Of Foresters - Mike Deering, Vice President Investments
Catholic Order of Foresters - Taylor Zeck, Investment Assistant
Converge RE - Moshe Lichtenstein, CIO
CSA Fraternal Life - John Kielczewski, President / CEO
ELCO Mutual - Ponni Nainar, Accounting Representative (Remote)
ELCO Mutual Life and Annuity - Silvio Rodia, VP/CRO
Government Personnel Mutual Life Insurance Company - Robert Draper, Vice President - Investments
Homesteaders Life Company - Steve Pick, Executive VP-Chief Financial Officer/Treasurer
KSKJ Life - Brian Sharp, CFO
SWBC Investment Services - John Tuohy, CEO
SWBC Life - Joan Cleveland, President & Chief Executive Officer
Trilogy Actuarial Solutions - Douglas Brown, Founding Partner
United Benefits, Inc. - Charlie Allison, President