

LIC ERM COMMITTEE

# Enterprise Risk Management: Shared Challenges and Practical Solutions



## LIC ERM Committee Meeting

Hosted by Liberty Bankers Insurance Group | Dallas | May 7-8, 2024



### PRELIMINARY AGENDA & EARLYBIRD ATTENDEE LIST

#### Tuesday, May 7, 2024

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 with the other attendees and get to know your fellow ERM execs.

2:30 pm CT **ERM Facilitated Discussion**

Questions submitted by participants will be prioritized and then serve as a launching point for group discussion. Topics requested so far include: ORSA, Capital Modeling, tools/services for tracking regulatory changes, how we can add value through ERM. Sign up and add the topics you'd like to discuss with your peers.

3:00 pm CT **Anticipating the Effects of AI on ERM Strategy and Management**

Kartik Sakthivel, PhD, MS-IT/MS-CS, MBA, PGC-IQ, Vice President & Chief Information Officer, and Regional Chief Executive Officer – Asia West, LIMRA and LOMA

Insights on the how the emergence and adoption of AI for insurance operations, marketing, product development, cybersecurity, etc., will influence and affect a company's ERM decisions.

4:00 pm CT **Adjourn for the Day**

6:30 pm CT **Hosted Networking Dinner**

#### Wednesday, May 8, 2024

8:30 am CT **Continental Breakfast Hosted by Liberty Bankers Insurance Group**

9:00 am CT **Practical ERM**

John Blocher, FSA, MAAA, Chief Risk Officer, Liberty Bankers Insurance Group

ERM topics with practical application including ERM Dashboard example and discussion, Minimum Guaranteed Interest (MGIR) Report example, plus ERM-ORSA Committee Recent Activities.

10:00 am CT **Panel & Discussion: ERM Insights**

Kelly Bretz, FSA, MAAA, CFA, Consultant, Bruce and Bruce  
Matt Earhart, Compliance/Enterprise Risk Specialist, Catholic United Financial

11:00 am CT **Additional Facilitated Discussion**

11:30 am CT **Networking Luncheon Hosted by Liberty Bankers Insurance Group**

12:30 pm CT **Adjourn**

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### EARLYBIRD ATTENDEE LIST

(as of 4/9/2024)

American Farmers & Ranchers Life - Mark Hayhurst, PMP, PFMM, Director, Strategic Planning & Operations (Remote)  
American Savings Life - John Shirts, CPA, CFA charterholder, Chief Financial Officer  
American Savings Life - Michael Frahm, MBA, CFP, ChFC, CLF, CCP, FLMI, Senior VP (Remote)  
Bruce and Bruce Company Consulting Actuaries - Kelly Bretz, FSA, MAAA, CFA, Consultant  
CSA Fraternal Life - Nick Kosmas, Secretary / Treasurer (Remote)  
Friedland Consulting Services, LLC - Bruce Friedland, MBA, FSA, MAAA, CLU, ChFC, Principal  
GPM Life - Wally Taylor, FALU, CLU, ChFC, FLMI, AIRC, ACS, Vice President, Corporate Underwriting Officer (Remote)  
Homesteaders Life Company - Judi Naanep, FSA, MAAA, CERA, VP Actuarial Services (Remote)  
Investors Preferred Life Ins. Co. - Alex Phillips, JD, Director of Compliance (Remote)  
KSKJ Life - Amy Bourg, ALMI, Manager of Operations, Compliance  
Liberty Bankers Insurance Group - John Blocher, FSA, MAAA, Chief Risk Officer  
Liberty Bankers Insurance Group - David Vrla, FSA, MAAA, FLMI, Chief Actuary  
LIC - Dean Lambert, Executive Director  
Parkway Advisors - Theron Holladay, CFA, President & CEO  
Physicians Mutual - Mark Nelson, FSA, MAAA, CERA, VP Enterprise Risk Management (Remote)  
Royal Neighbors of America - Rebecca Cavanaugh, Deputy General Counsel  
Savings Bank Mutual Life Insurance Company of Massachusetts - Maria Cianfichi, CPA, CFSA, CRMA, VP, Dir of Internal Audit/ERM/SIU (Remote)  
Teachers Life - Cherrisse Norman, MBA, CPA, CMA, Chief Financial Officer/Chief Operating Officer (Remote)