

## AGENDA & SAMPLE ATTENDEE LIST

Hosted By



### Wednesday, June 5, 2024

- 2:00 p.m. **Welcome from LIC & RGA**
- 2:15 p.m. **From Beginning to End: An Exploration of the Final Expense Policy Life Cycle**  
*Scott Grandmont, CLU, FALU, FLMI, FLHC, AIRC, ARA, ACS, Vice President, Underwriting Solutions, RGA*  
*Nathan Hill, FSA, MAAA, VP & Actuary, RGA*  
*JS Ledoux, ASA, Head of North American Product Management, Foresters Financial*  
This panel will discuss the entire final expense cycle, including problems and solutions in Sales/Distribution, Underwriting/Application Process, Policy Delivery, Administration/Monitoring, and Claims.
- 3:15 p.m. **Facilitated Discussion on Final Expense Topics**
- 4:00 p.m. **Sessions Adjourn for the Day**
- 6:30 p.m. **Hosted Networking Dinner at [EdgeWild Restaurant and Winery](#)**

### Managing Final Expense Profitability

In managing life products, especially small face life products, mortality is the biggest factor in achieving profitability and expected results. Tiny improvements in execution can mean big increases in profitability when you sell large volumes of small policies. Are you managing every aspect of this process?

This annual workshop includes detailed presentations covering all areas of final expense administration, management, and marketing. Attendees learn from industry experts, case studies, and discussion with peers at other companies, and have ample time for networking with fellow attendees and vendors interested in working with final expense companies.

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

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## LIC Final Expense Workshop

**Thursday, June 6, 2024**

7:30 a.m. **Continental Breakfast**

8:30 a.m. **How Predictive Modeling Can Help To Manage and Improve Final Expense Profitability**

*Michel Hebert, VP of Pricing and R&D, Optimum Life Re*

*Guillaume Ducharme, Director of R&D, Optimum Life Re*

Learn how to build a predictive model to assess mortality; how predictive modeling can improve the knowledge of your mortality risk compared with traditional methods; how predictive modeling insights can impact mortality experience, risk selection, and profitability, and improve the quality of your block of business.

9:30 a.m. **Future of the Final Expense Market**

10:30 a.m. **Break**

11:00 a.m. **Case Study/Discussion: Market Opportunities in Final Expense**

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

1:00 p.m. **LIC Final Expense Survey Discussion**

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



## LIC Final Expense Workshop – Sample Attendee List (from Last Year)

Aetna - Actuarial Manager	Optimum Life Reinsurance - Director
Aetna - Director	Optimum Life Reinsurance - VP, R&D
Aetna - Lead Director, Product Management / Development	Optimum Life Reinsurance - Vice President, Claims
American Home Life - National Sales Director	Optimum Life Reinsurance - AVP, Client Services
American Home Life - VP-Underwriting and Administration	Optimum Life Reinsurance - Vice President Business Development
American-Amicable Group of Companies - Underwriting Manager	Parkway Advisors - President / CEO
American-Amicable - VP, New Business & Marketing Admin	Prudential - Director
Americo - Senior Marketing Manager, Product Development	QLAdmin Solutions - CTO & Director of Software Development
Bankers Life Insurance Company of America - President	QLAdmin Solutions - Chief Marketing Officer
BetterLife - SVP Member Experience	RGA - Executive Director, Underwriting
Cincinnati Equitable Life - Chief Operating Officer	RGA - Actuary
Competiscan - Sr. Sales Director	RGA - VP, Business Development
Converge Re - Head of Business Development	RGA - VP Business Initiatives
Corebridge Financial - Director, Product Management	Royal Neighbors of America - Product Manager
ELCO Mutual - Vice President of Business Development	Security National Life - VP
ELCO Mutual - SVP, CSO	Security National Life - VP Marketing & Sales Operations
EMC National Life - Underwriting Manager	Sons of Norway - Life and Annuity Product Manager
EPOQ - Business Development Director	Swiss Re - SVP
ExamOne - Strategic Account Executive	thinktum - CFO
ExamOne - National Sales Insurance Director	thinktum - Director, Underwriting Innovation & Integration (US)
Friedland Consulting Services, LLC - Principal	Toronto Police Widows and Orphans Fund - CEO and President
GPM Life - Vice President - Director of Marketing	Trilogy Actuarial Solutions - Partner
GTL - Actuary	Trilogy Actuarial Solutions - Founding Partner
Homesteaders Life Company - VP-Independent Distribution	TruStage - Manager of Final Expense Partner Experience
INSTANDA - VP of Sales	United Benefits - Chief Marketing Officer
Insurance Supermarket - Director, Product Management	United Home Life - Director of Marketing
iPipeline - Software Sales Director	Wellabe - Product Manager
iPipeline - VP, Product Management	Zinnia - Sales Director
Kansas City Life Insurance Company - Senior Actuarial Assistant	
KSKJ Life - CMO	
LCBA - VP-Administration/Secretary	
LCBA - President and CEO	
Lewis & Ellis, Inc. - Assistant Vice President	
Lewis & Ellis, Inc. - Vice President & Consulting Actuary	
LifeShield National Insurance Company - Actuarial Manager	
LifeShield National Insurance Company - President	
Lincoln Heritage Life Insurance - Vice President	
Locke Lord LLP - Attorney	
Management Research Services, Inc. - Chief Executive Officer	
Milliman Intelliscript - Client Relationship Manager	
Milliman, Inc. Principal and Consulting Actuary	
Milliman, Inc. - Principal & Consulting Actuary	
Milliman, Inc. - Director, Sales & Marketing	
Munich Re - Regional VP Business Development	
Munich Re - Senior Data Scientist	
Mutual of Omaha - SVP	
Old American Insurance Company - VP Sales & Marketing	