



## LIC Operations Committee Meeting

Hosted by American Enterprise Group | Des Moines, IA | September 10-12, 2019 | [www.loma.org/LICOPS](http://www.loma.org/LICOPS)

Meeting Location: American Enterprise Group, 601 6th Avenue, Des Moines, IA 50309  
Recommended Hotel: Hilton Des Moines Downtown, 435 Park Street, Des Moines IA 50309, (515) 241-1456  
Call the hotel directly and mention American Enterprise Group for the corporate rate of \$149/night.  
For additional hotel options see [www.loma.org/LICOPS](http://www.loma.org/LICOPS)

### PRELIMINARY AGENDA

#### Tuesday, September 10, 2019

6:30 p.m. **Hosted Networking Dinner at Hessen Haus**  
Meet in Hilton lobby at 6:15 p.m. to walk/carpool together. Hessen Haus is at 101 SW 4th St, Des Moines, IA 50309, about .6 mile or 15 minutes' walk.

#### Wednesday, September 11, 2019

8:00 a.m. **Continental Breakfast provided by American Enterprise Group**  
Meet in Hilton lobby at 7:45 a.m. to walk together.

8:30 a.m. **Welcome & Attendee Introductions**  
Meg Brown, Vice President, CAO, American Enterprise Group  
Jeff Shaw, CLU, ChFC, Executive Director, LIC

10:00 a.m. **Break**

10:30 a.m. **Facilitated Discussion with Live Polling** ([www.pollev.com/LICmeets](http://www.pollev.com/LICmeets))  
Jeff Shaw, CLU, ChFC, Executive Director, LIC  
Find out what others are doing, what's working and what isn't, and discuss common challenges and solutions. Topics will be pre-selected by participants; here are some from last year:

- Leveraging Technology
- Transitioning to Open Office Architecture
- Commission payments and Debit Balance Processes
- Call Center Workflow Management Systems
- E-signatures
- In-house forms management
- Conservation

12:00 p.m. **Networking Luncheon provided by American Enterprise Group**

1:00 p.m. **Case Study: Claims System Installation**  
Meg Brown, Vice President, CAO, American Enterprise Group  
Brent Williams, ChFC, Founder & CEO, Benekiva

2:00 p.m. **Facilitated Discussion with Live Polling (continued)**

2:30 p.m. **Tour of American Enterprise Group**

3:00 p.m. **Adjourn for the Day**

6:30 p.m. **Hosted Networking Dinner at Americana Restaurant**  
Meet in Hilton lobby at 6:10 p.m. to walk/drive together. Americana is located at 1312 Locust St, Des Moines, IA 50309, .9 mile or 20 minutes' walk.

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## **Thursday, September 12, 2019**

- 8:00 a.m.           **Continental Breakfast hosted by American Enterprise Group**
- 8:30 a.m.           **Automating to Improve Efficiency and Processes**  
Dana Devine, FLMI, FALU, Director-Life Policyholder and Agent Services, United Home Life/Indiana Farm Bureau  
Deborah Culliton, VP Research & Consulting, Novarica
- 9:30 a.m.           **Facilitated Discussion with Live Polling (continued)**
- 11:00 a.m.          **Adjourn**

## **Preliminary Registration List**

AFBA - Rita Klein, ALMI, ACS, Operations Manager and Innovation Specialist  
American Enterprise - Haley Vermie, FLMI, Underwriting Director  
American Enterprise Group - Kim Barney, AVP New Business Acquisition  
American Enterprise Group - JoAnne TURNER, Underwriting and Image Supervisor  
American Enterprise Group - Pam Riley, Manager, Claims Department  
American Enterprise Group - Kathy Lee, FLMI, ACS, Claims Director  
American Enterprise Group including Great Western Ins Co - Meg Brown, FLMI, HIAA, MHP, Chief Administrative Officer  
American Enterprise Group, Inc. - Tammy Moran, Claims Supervisor  
BankersWorksite - Brian Murray, FLMI, ARA, ACS, Assistant Vice President  
Benekiva - Brent Williams, ChFC, Founder & CEO  
CSA Fraternal Life - Matt Koski, Secretary Treasurer  
FAST Technology - Derek Sharron, Vice President  
Homesteaders Life Company - Krista Frank, CLU, FLMI, ACS, Assoc CPC, Senior Vice President, Customer Service  
KSKJ Life - Lauren Rainey Rainey, Director, Operations  
LIC - Jeff Shaw, CLU, ChFC, Executive Director  
LifeShield National Insurance Co - Val Rajic, Chief Operating officer  
Management Data, Inc. - Pat Michael, FLMI, CLU, ChFC, CLTC, President, CEO  
Management Research Services, Inc. - Tim Dineen, Chief Executive Officer  
Management Research Services, Inc. – Nathan Byram, Chief Investment Officer  
National Guardian Life Insurance Company - Stephanie Ek, VP, Admin Services  
National Guardian Life Insurance Company, United States - Michelle Hartley, AVP & Director of Customer Service  
Novarica - Deborah Culliton, VP Research & Consulting  
Royal Neighbors of America - Karen Hayes, ALMI, Senior Director, Agent & Customer Services  
Texas Service Life Ins. Co. - Casey Hughes, Chief Operating Officer  
United Home Life Insurance Company - Dana Devine, FLMI, FALU, Director-Life Policyholder and Agent Services