



LIC Supplemental Products Committee Meeting

Hosted by Liberty Bankers Life, Dallas, TX

March 26-28, 2019

Meeting Location: Liberty Bankers Life Insurance Company, 1605 LBJ Freeway, Dallas, TX 75234

Recommended Hotel: [DoubleTree by Hilton Hotel Dallas – Farmers Branch](#)

11611 Luna Road, Farmers Branch, TX 75234 (972-506-0055)

Preliminary Agenda

Tuesday, March 26, 2019

6:30 p.m. Networking Dinner

Wednesday, March 27, 2019

8:00 a.m. Continental Breakfast

8:30 a.m. **Welcome & Attendee Introductions**
Jeffrey S. Shaw, CLU, ChFC, Executive Director, LIC

10:00 a.m. Break

10:30 a.m. **Facilitated Discussion using Live Polling**
Participants will be invited to submit questions for the group to answer on the polling software, view response data onscreen, and do a deeper dive in open discussion. Topics will include:

- Claims Process – underwriting at time of claim
- TPA's – vetting, security, monitoring
- Enrollment strategies
- Agent/Enrollee training
- Product trends – Critical Illness/Accident/Hospital Indemnity

12:00 p.m. Networking Luncheon

1:00 p.m. **Compliance and Product Development Update**
Stacy Koron, Compliance Consultant, Milliman, Inc. and Bill Bade, Sydney Consulting

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

3:00 p.m. Adjourn for the Day

6:30 p.m. Networking Dinner

Thursday, March 28, 2019

- 8:00 a.m. Continental Breakfast
- 8:30 a.m. Tour of Liberty Bankers
- 9:00 a.m. **Marketplace Trends**
Competiscan & Gen Re (Steve Rowley)
- 10:15 a.m. **Facilitated Discussion using Live Polling (continued)**
- 11:00 a.m. Adjourn

Preliminary List of Participants

1956 - Director
5Star Life Insurance Company - VP Business Insurance Markets
American National Ins. Co. - Senior Vice President
American National Insurance Co - Asst. Vice President, Field Support
Columbian Mutual Life Insurance Company - President & CEO
General Re Life Corp. - Vice President & Senior Account Executive
GPM Life – AVP
Leaders Life - Director of Operations
Leaders Life Insurance - Policy Issuance Supervisor
Liberty Bankers Life - Chief Risk Officer
Liberty Bankers Life Insurance - EVP, Chief Actuary
Liberty Bankers Life Insurance - AVP, Actuary
Madison National Life - SVP
Management Research Services, Inc. - Chief Executive Officer
Milliman, Inc. - Principal & Compliance Consultant
QLAdmin Solutions - Chief Marketing Officer
Senior Life Insurance Company - President
Sydney Consulting Group - Consultant
Sydney Consulting Group - Consulting Actuary
Texas Service Life Insurance Company - Chief Actuary
Universal Fidelity Life Insurance Co - CEO

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