Your Trusted Source for Industry Knowledge

LIMRA

LOMA

LL Global

is a worldwide research, consulting, and professional development organization that connects people to information, thought leadership, solutions … *and each other.*

Serving our members and our industry is at the heart of everything we do, encompassing global research, data analytics, education and training, assessment, and networking.

The Story of Us

Two Brands With One Goal

Our dedication to creating valuable connections for our members and industry is the legacy of two powerful and storied service brands — LIMRA and LOMA — both founded in the early 20th century.

Over time, LIMRA evolved from a provider of cutting-edge talent assessments into a premier industry research organization while LOMA became the flagship for industry education and training. Then, in 2008 LIMRA and LOMA merged under the LL Global umbrella, creating a powerful trade association with a multitude of products to support its members and the industry.

The evolution continued, and The LIMRA LOMA Secure Retirement Institute was established, in 2013. The Institute provides comprehensive, objective retirement research and education, as well as a forum for senior leaders to identify and explore related issues worldwide.

Today, our integrated organization represents more than 1,300 members across 64 countries, including most of the world's largest life insurance companies.

As the trusted source for industry knowledge, we help our members anticipate and seize new opportunities in technology, retirement, and markets worldwide. We further support member competitiveness and industry relevance by providing research, education and training, industry solutions, and global member events.

Your Trusted Source for Industry Knowledge

Global Research & Data Analytics

Global research and data analysis enable member companies to develop and execute effective business strategies for engaging today's dynamic markets. With our unbiased quantitative and qualitative research on consumers, technology, regulations, distribution, life insurance, retirement, and other financial products, your organization can identify growth opportunities and monitor key trends worldwide.

The Center of Excellence (COE) for Analytics

This COE is helping shape the future of insurance by exploring and applying the latest statistical techniques to our vast collection of industry data, publishing cutting-edge analytics research, and supporting our analytics-education initiatives.

Benchmarking & Trend Analysis

Our quarterly and annual reports allow you to compare your company's product sales to those of peer organizations. Members who participate also receive an additional confidential report that includes sales data by company allowing further market analysis and exploration.

General & Strategic Research

Each year we offer more than 100 general and strategic research reports and briefs giving global context to deep local marketplace intelligence. Research topics include customer engagement, distribution channels, technology development and applications, retirement, and specific regional and local markets.

Custom Research & Consulting

Our consulting practice places our strengths in research, training, assessment, learning, development, and professional engagement at your service. We work with you to define your objectives, challenges, and opportunities in distribution, talent management, customized research, and implementation analysis. We then deliver strategic and tactical solutions aligned with your resources, regulatory climate, markets, and competitive environment.

Connecting People With Solutions

Education & Professional Development

Our professional education, training, and development online courses and in-person onsite programs are designed to measurably improve your management and operations and drive higher levels of performance and growth.

- **Designations**
  Our professional designations—recognized worldwide—are awarded for completion of significant knowledge- and skills-based learning experiences. Developed by the industry for the industry, they are designed specifically for back office professionals, producers, managers, and executives.

- **Insurance Immersion**
  Insurance Immersion is a proven way for industry entrants to quickly assimilate the industry's complex products, functions, and terminology to hit the ground running.

- **LIMRA Leadership Institute**
  The Institute's fresh view on relevant, actionable topics helps financial services leaders hone critical competencies, achieve heightened levels of success for themselves and their organizations, and build invaluable relationships with their peers.

- **Trustworthy Selling®**
  The program provides an unparalleled approach to successful selling through in-depth insight into consumer behavior, buyer-and-seller psychology, and top producer sales skills.

- **Field Onboarding**
  Creating a high performance team begins with the critical onboarding process, educating, training, and developing talent as efficiently, comprehensively, and quickly as possible. Our series of sales, management, and leadership effectiveness programs—based on LIMRA research—help sales professionals transform potential into optimal performance and growth.

- **Compliance Education Platform**
  Developed by the industry for the industry, our compliance education programs address ever-changing requirements. Offerings include Fiduciary Education for Sales & Service Professionals, AnnuityXT, U.S. and Canadian Anti-Money Laundering Training, and Recognizing Financial Exploitation.

Creating Talent & Transformative Connections

Supporting Industry Evolution

Talent Assessments

Our time-tested, performance-driven approach to applicant and employee assessment enables you to achieve your business goals with effective recruiting, selection, productivity, and retention solutions not only in the field, but also in your home office and customer contact center.

Networking

At the core of our organization is industry connectivity. We bring industry professionals and executives together globally through conferences, committees, study groups, and workshops. With close to 30 annual conferences and over 120 committee meetings throughout the year, industry professionals have an invaluable opportunity to hear about best practices and emerging trends from thought leaders in the business and private sectors that shape our industry's future.

Industry Utility and Innovation

Our focus and extensive industry relationships position our association at the center of emerging trends that will both challenge and create opportunities for our industry. We not only serve as an information clearinghouse, we also develop innovative solutions for the industry.

- **FraudShare** Partnering with member firms, we have developed an innovative information-sharing platform, called FraudShare, to help financial services companies identify and deter fraudulent attacks. In addition to serving as a secure communications network for members, FraudShare applies analytics to reported instances of fraud and generates alerts, enabling companies to identify fraudsters, take preventive actions, and benchmark their fraud experiences versus their peers.
- **EDI Standards** As benefits administration technology proliferates in the employer marketplace, demand for data-feed integration has increased dramatically. In collaboration with member companies, we have established a stewardship and governance organization to develop and maintain an industry standard.
- **Fiduciary Solutions** In a dynamic regulatory environment, members need current information and analysis to understand the potential implications for their business models. We have a dedicated resource on our website that organizes our most relevant research, expert thought pieces, and other related materials that companies can mine as they develop implementations plans.

Next Steps

When you make the right connection, it creates a spark generating light, energy, and the potential to power change. Making that connection, creating that spark, and helping to generate forward momentum — for the industry and our members — is what we're all about.

Let's continue to explore how you and your firm can make those transformative connections....

To learn more about how we can help you achieve your business objectives, contact your LIMRA or LOMA Member Relations Director or email us at

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LL Global, Inc.

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www.limra.com

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