

Managing Final Expense Profitability

Co-Hosted by **Optimum Life Reinsurance Company**

Via Videoconference

Wednesday, June 10, 2020 10 a.m. – 3 p.m. EDT and Thursday, June 11, 2020 10 a.m. – 3 p.m. EDT

Register at www.loma.org/finalexpense

PRELIMINARY AGENDA & ATTENDEE LIST

Antitrust Policy: www.loma.org/antitrust

Before the Meeting

1. Submit Questions for Live Polling by June 5 to jshaw@limra.com.
2. Registrants will receive Outlook invitations - Advance Attendee List and Webex link will be provided in the calendar events.

Wednesday, June 10, 2020

9:30 a.m. EDT The Meeting Room will open 30 minutes early for A/V checks and conversation.

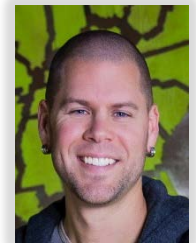
10:00 a.m. **Welcome & Attendee Introductions**

Jeff Shaw, CLU, ChFC, Executive Director, Life Insurers Council

11:00 a.m. **Facebook Leads – Better Than Direct Mail**

Ryan Thogmartin, CEO, Disrupt Media

Ryan Thogmartin is the CEO and founder of Disrupt Media, a compelling brand that specializes in the niche market of Facebook marketing for funeral homes. Ryan's insights in branding, marketing, and the specifics of how to leverage Facebook's tools are relevant to final expense life insurance carriers—see what's competing for your customers' attention!



12:00 p.m. **Break**

1:00 p.m. **Final Expense Facilitated Discussion**

Jeff Shaw, CLU, ChFC, Executive Director, Life Insurers Council

The number-one value cited by LIC conference attendees is the ability to participate in open discussions with peers. This year we've carved out 75 minutes and invested in real-time survey software so we can report live feedback on your most pressing questions. Provide your questions ahead of time to jshaw@limra.com. We'll poll the attendees and lead the discussion on everything you always wanted to know about Final Expense but never had the opportunity to ask.

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

www.loma.org/finalexpense

Thursday June 11, 2020

9:30 a.m. EDT The Meeting Room will open 30 minutes early for A/V checks and conversation.

10:00 a.m. **Covid-19: Where We Are Today and a Look Into the Future**

Optimum Life Reinsurance Panelists:

Dr. Paulo Pinho, MD, FAAP, FACP, Chief Medical Director

Monica Clink, FLMI, FLHC, AFA, Vice President of Claims

Jill Thompson, AALU, FLMI, ACS, HIA, Underwriting Director

Moderator: Terrence J Weiser, ARA, ACS, Assistant Vice President Business Development

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Thursday June 11, 2020, continued

- 11:00 a.m. **Milliman's Next Final Expense Study and Survey – What's New and What Do You Want?**
Al Klein, FSA, MAAA, Principal & Consulting Actuary, Milliman
David Cook, FSA, MAAA, Principal, Milliman
This session will begin with a brief description of Milliman's new final expense study and survey, with a focus on the new features and survey questions. It will then become an interactive session where Milliman would like to get your ideas on what final expense industry information is most important to you. Our goal is to create a comprehensive set of information to help you answer your most pressing questions. This meeting has been one of the most interactive in the industry and our hope is that you help us to help you.
- 12:00 p.m. **Break**
- 1:00 p.m. **Execution in a Time of Crisis**
Tim Dineen, CEO, Management Research Services
MRS will present its continued transformation journey and Execution in a Time of Crisis. During a time of uncertainty, agile is not just a buzz word, it is the difference between profitability and loss. MRS will share its journey, including both the successes and challenges to learn from.
- 2:00 p.m. **LIC Final Expense Survey Results**
Jeff Shaw, CLU, ChFC, Executive Director, Life Insurers Council
Be one of the first to hear the highlights of LIC's annual Final Expense Survey Report with the added benefit of discussing some of the implications of the results with your peers.
- 3:00 p.m. **Adjourn**

Earlybird Registration List (6/2/2020)

- 4C Solutions - Stacey Cheese, President
Aetna - Richard Waggoner, FSA, MAAA, Director
Aetna, Inc. - Scott Root, Product Management / Development Manager
American Enterprise - Great Western Insurance Co. - Dave Munk, CLU, ChFC, AVP Life Implementation
American Enterprise Group - Kyle Nodurft, FSA, AVP Actuary
American Home Life - Tom Lobell, VP Marketing
Americo Life and Annuity Insurance Company - Todd Adrian, Senior Marketing Manager, Product Development
Amerilife Group, LLC - Pat Fleming, FSA, EVP Product Innovation, Corporate Actuary
Amerilife Group, LLC - Scotty Elliott, President, Life & Health Brokerage Distribution
Catholic Life Insurance - Mike Belz, FIC, LLIF, President and Chief Executive Officer
Catholic United Financial - Kelly Bretz, FSA, MAAA, CFA, ERM Consultant
Columbian Financial Group - Alan Igielski, FSA, MAAA, Second VP and Actuary
Columbian Mutual Life - Tammy Marlotte, FLMI, ACS, Second Vice President, Underwriting, Chief Underwriter
Columbian Mutual Life - Rick Relf, FLMI, ALHC, ACS, SVP, Chief Marketing Officer
DISRUPT Media - Ryan Thogmartin, CEO
Foresters Financial - JS Ledoux, ASA, ASA, AVP, Product Management North America
KSKJ Life - Lauren Rainey, ALMI, ACS, Director of Operations
KSKJ Life - Stu Buchanan, FLMI, COO
Landmark Life Insurance Company - Tom Munson, JD, President
LexisNexis Risk Solutions - Barb Gangware, Vertical Account Manager
Lincoln Heritage - Judy Pettit, FSA, MAAA, Vice President & Chief Actuary
Lincoln Heritage - Darlene Taaffe, ASA, MAAA, Associate Actuary
Lincoln Heritage - Monica Sole, VP Govt & Industry Relations
Management Research Services - Tim Dineen, CEO
Landmark Life - Tom Munson, JD, President
Luminant Analytics - Renu Joseph, CEO
Milliman - Al Klein, FSA, MAAA, Principal/Consulting Actuary
Milliman - David Cook, FSA, MAAA, Principal
Navy Mutual Aid Association - Daniel Pautler, CLU, ChFC, Activation & Professional Education Manager
Navy Mutual Aid Assoc. - Josh Feuerstein, Mktg Dir
Old American Ins. Co. - Brad Cope, VP Sales & Marketing
Optimum Life Reinsurance Co. - Jill Thompson, FLMI, AALU, ACS, HIA, Underwriting Dir.
Optimum Life Reinsurance Co. - Marie-Andree Gagne, ASA, MAAA, Dir. Pricing
Optimum Life Reinsurance Co. - Monica Clink, FLMI, FLHC, AALU, FFSI, PCS, AAPA, AIRC, ARA, HIA, V.P. Claims
Optimum Life Reinsurance Co. - Terrence Weiser, Asst VP Business Development
Optimum Life Re. - Tu Hornstra, FLMI, ACS, Account Mgr, Business Development
Parkway Advisors - Kyle Timmermann, Director of Consulting
QLAdmin Solutions - Kat Correa, MBA, FLMI, Chief Marketing Officer
RGA - Brian Sibley, FSA, VP, Business Development
Royal Neighbors of America - Karen Hayes, ALMI, Operations Executive
Royal Neighbors of America - Patty Adams, ACS, ALHC, Director & Chief Underwriter
Royal Neighbors of America - Jay Csipkes, MACCT, Sales Executive
Senior Life Insurance Company - Ron Powell, President
Texas Service Life Insurance Company - George Wise, FSA, Chief Actuary
Trinity Life Insurance Company - Alvin Begnoche, CLU, ChFC, VP Marketing
United Home Life - Steve Ramsey, CLU, ChFC, Director, Independent Distribution Channel Marketing
Western Fraternal Life - Kevin Simpson, CLU, CRPC, FIC, VP Sales & Marketing

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