LIC Workshop

Managing Final Expense Profitability

Co-Hosted by Optimum Life Reinsurance Company
Via Videoconference
Tuesday, June 8 and Wednesday, June 9, 2021 | 10 a.m. – 3 p.m. EDT both days

Register at **www.loma.org/finalexpense**

PRELIMINARY AGENDA & SAMPLE ATTENDEE LIST

Antitrust Policy: **www.loma.org/antitrust**

Before the Meeting

1. Submit questions for Live Polling by June 4 to jshaw@limra.com.

2. Registrants will receive Outlook invitations – The Advance Attendee List and Webex link will be provided in the calendar events.

Monday, June 7, 2021

7-8 p.m. EDT **Pre-Meeting Happy Hour on Remo**
A fun, casual BYOB virtual happy hour for networking before the meeting.

Tuesday, June 8, 2021

9:30 a.m. EDT **Check-In & Conversation**
The Meeting Room will open 30 minutes early both days 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. **Foresters Final Expense Case Study Update**
JS Ledoux, ASA, AVP, Product Management North America, Foresters Financial

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. Using real-time survey software, we report live feedback on your most pressing questions, with a deeper dive into topics of interest. 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 didn't have the opportunity to ask.*

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

www.loma.org/finalexpense

Follow on Twitter
#LICmeets

Wednesday, June 9, 2021

9:30 a.m. EDT **Check-In & Conversation**

10:00 a.m. **Final Expense Strategies in the Low Interest Rate Environment**
Optimum Re's asset management company, Quantvest will be speaking on investing during the low interest rate market and ways to make returns on this product line.

11:00 a.m. **LexisNexis "Voice of the Customer" Focus Group Findings**
Over the past year LexisNexis has conducted Voice of Customer (VOC) research among several final expense insurers to better understand their pain points and challenges. They found three key areas of focus:

- *Fraud prevention—minimizing exposure*
- *Identity data—ensuring accuracy of data feeding e-apps*
- *Lapse rates – identifying retention risks*

Hear their insights on workflow and best practices to address these pain points. Join in interactive discussion on these issues, including audience feedback via polling.

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

1:00 p.m. **Final Expense Case Study**

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**

Sample Registration List (from Last Year's Final Expense Workshop)

4C Solutions: Stacey Cheese, President
Aetna: John Cook, Actuarial Team Lead
Aetna: Richard Waggoner, Director
Aetna: Scott Root, Product Management/Development Mgr
American Enterprise - Great Western: Dave Munk, AVP Life Implementation
American Enterprise Group: Kyle Nodurft, AVP Actuary
American Home Life: Tom Lobell, VP Marketing
Americo Life and Annuity: Todd Adrian, Senior Marketing Manager, Product Devel
Amerilife: Pat Fleming, Executive VP, Product Innovation and Corporate Actuary
Amerilife Group, LLC: Scotty Elliott, President, Life & Health Brokerage Distribution
Apptical Corp.: Peggy Bartraw
AuclairRe International, Inc.: Joël Thompson, President
Bankers Life Insurance Co. of America: Louis Bickel, President
Catholic Life: Frank Gentile, Vice President, Chief Underwriter
Catholic Life: Mike Belz, President and Chief Executive Officer
Catholic United Financial: Kelly Bretz, ERM Consultant
Columbian Financial Group: Alan Igielski, Second VP & Actuary
Columbian Mutual: Rick Relf, SVP, CMO
Columbian Mutual: Tammy Marlotte, Second VP, Underwriting, Chief Underwriter
ELCO Mutual Life & Annuity: Bill Bruce, Marketing Manager
Foresters Financial: JS Ledoux, AVP, Product Management North America
GPM Life: Sean Staggs, Actuary
GPM Life: Tonya Carroll, VP, Customer Experience Officer
Kemper Corporation: Michael Marinaccio, Vice President - Corporate Development
KSKJ Life: Lauren Rainey, Director of Operations
KSKJ Life: Stu Buchanan, COO
Landmark Life Insurance Company: Tom Munson, President
LexisNexis Risk Solutions: Barb Gangware, Vertical Acct Mgr
Lincoln Heritage: Darlene Taaffe, Associate Actuary
Lincoln Heritage: Judy Pettit, Vice President & Chief Actuary
Lincoln Heritage: Monica Sole, VP Govt & Industry Relations
Luminant Analytics: Renu Joseph, CEO
Management Research Services, Inc.: Tim Dineen, CEO
Management Research Services: John Flueckiger, VP Sales
Management Research Services: Mike Risley, Industry Advisor
Milliman: Al Klein, Principal and Consulting Actuary
Milliman: David Cook, Principal
Milliman: Stacy Koron, Principal & Compliance Consultant
MRS: Brenda Larson, Director of Life Strategy & Innovation
Mutual of Omaha: Matt Nuttleman, Managing Actuary
Navy Mutual: Daniel Pautler, Activation & Professional Education Manager
Navy Mutual Aid Association: Josh Feuerstein, Mktg Director
Old American Insurance Co.: Brad Cope, VP Sales & Marketing
Old American Insurance Company: Dave Metzler, Chief Actuary
Optimum Life Re: Jill Thompson, Underwriting Director
Optimum Life Re: Marie-Andree Gagne, Director, Pricing
Optimum Life Reinsurance Company: Monica Clink, V.P. Claims
Optimum Life Re: Paulo Pinho, Chief Medical Officer
Optimum Life Re: Terrence Weiser, Assistant VP Business Devel
Optimum Life Re: Tu Hornstra, Acct Manager, Business Devel
Parkway Advisors: Kyle Timmermann, Director of Consulting
Parkway Advisors: Theron Holladay, President
Polish Roman Catholic Union of America: Jim Robaczewski, National President
Prosperity Life: Sally Scott-Parker, AVP, Underwriting & Claims, Risk Management
QLAdmin Solutions: Kat Correa, Chief Marketing Officer
ReMark: Jackie Stearns, SVP Marketing & Strategy
ReMark: Steve Gaertner, SVP, Distribution Strategies
RGA: Matt Fingerhut, Vice President and Actuary
RGA: Brian Sibley, VP, Business Development
RGA: Joe Plut, Executive Director, Business Development
Royal Neighbors of America: Jay Csipkes, Sales Executive
Royal Neighbors of America: Karen Hayes, Operations Exec
Royal Neighbors: Patty Adams, Director and Chief Underwriter
Security National: Marty Rich, Director of Sales Operations
Security National: Tommy Overton, National Sales Director
Senior Life Insurance Company: Ron Powell, President
Texas Service Life: George Wise, Chief Actuary
Trinity Life: Alvin Begnoche, Vice-President, Marketing
United Home Life: Steve Ramsey, Director, Independent Distribution Channel Marketing
Western Fraternal Life: Kevin Simpson, VP Sales & Marketing