

2024 LIC ANNUAL CONFERENCE


The Westgate Hotel, San Diego | February 7-9, 2024

AGENDA & ATTENDEE LIST

We chose **Imagine!** as this year's LIC Annual Conference theme because that's what it takes to thrive, compete and grow today and into the future. We have created an agenda and environment to catalyze forward-thinking imagination and discussion about new technologies, consumer perceptions, expectation and needs, plus new ways to manage in a world that seems to accelerate faster every year. We'll hear from companies and individuals who have a unique perspective on growth and innovation, and we'll engage in interactive sessions designed to send everyone home with practical ideas that can be implemented to help your company succeed. [#LICMeets](#)

Wednesday, February 7, 2024

- 6:00 p.m. Opening Reception & Registration
- 7:00 p.m. Dinner On Your Own



Attendee Materials Are in the App!

See the LIC2024 App for room locations, announcements, attendee networking, and much more! www.loma.org/LICApp

Thursday, February 8, 2024

- 8:00 a.m. Networking Breakfast & Registration
- 8:30 a.m. Welcome from LIC's Board Chair
Steve Shaffer, CEO, Homesteaders Life Company



Steve Shaffer

- 8:45 a.m. [Keynote Address](#)
- The Result: The Practical, Proven Formula for Getting What You Want

Dave Crenshaw, Founder & CEO, Invaluable, Inc.

What big-impact, game-changing result are you looking to achieve? In this interactive presentation Dave Crenshaw will unveil the secret, simple, and potent formula of The Result. You'll gain a practical tool you—and others in your company—can use to consistently obtain success. Takeaways include:

- A problem-solving solution that can drive organizational growth
- How to develop a culture of effective coaching
- Techniques to motivate and empower your team, anticipate roadblocks, and strategize your success.

As an author, speaker, and online instructor, [Dave Crenshaw](#) has transformed the lives and careers of hundreds of thousands around the world. He has appeared in Time magazine, USA Today, FastCompany, and the BBC News. His [courses on LinkedIn Learning](#) have been viewed tens of millions of times. His five books have been published in eight languages, including time management bestseller [The Myth of Multitasking](#).



Dave Crenshaw

- 10:00 a.m. Networking Break
- 10:30 a.m. Innovative Approach to Serving the 62+ Age Group
Kevin Nazemi, CEO, and Nick Shutwell, SVP of Growth & Distribution, Charlie Financial



Nick Shutwell



Kevin Nazemi

Thursday, February 8, 2024 (continued)

11:15 a.m.

Imagine! Facilitated Discussion

Facilitator: Dean Lambert, Executive Director, LIC

Your meeting...your topics! A focus of every LIC meeting is a facilitated discussion featuring your requested topics of opportunities and challenges as leaders of small-to-midsize insurance companies. Requested topics include AI, geopolitical outlook, staff development and employee engagement, remote work structure, and investments.



Dean Lambert

12:00 p.m.

Networking Luncheon

1:00 p.m.

Imagine YOUR COMPANY 2.0:

Harnessing Innovation Ideals for Growth

Carlos Rojas, Founder of 2.0, Innovation and Business Transformation expert

What if your company's innovative ideals could be the driving force behind its transformation and growth? In this dynamic session, we invite you to imagine that future. Carlos Rojas, an expert known for his relentless pursuit of understanding new trends and decoding human behaviors, will guide you on a journey toward "YOUR COMPANY 2.0." His experience spans helping startups to Fortune 500 companies craft business strategies that enhance current reach and profitability while also fostering future growth.

Carlos will provide a glimpse into what the next evolution of your organization could look like by harnessing these ideals. He will share insights on leveraging innovative ideals, emerging trends, and shifts in consumer behavior to drive your organization's transformation.



Carlos Rojas

2:30 p.m.

Facilitated Discussion Part II

Continuation of requested discussion topics.

3:30 p.m.

Sessions Adjourn for the Day

6:00 p.m.

Networking Reception

6:30 p.m.

LIC Annual Membership Banquet

LIC's traditional annual banquet is a chance to enjoy fine dining, develop old and new friendships in the industry, and mark the occasion as the LIC leadership is handed from 2023 LIC Chair Steve Shaffer, CEO of Homesteaders Life Company, to incoming 2024 Chair Tony Mravle, CEO of KSKJ Life.

Thank You To Our Banquet Sponsors!



Friday, February 9, 2024

8:00 a.m. **Networking Breakfast**

8:30 a.m. **Welcome from LIC's Incoming Board Chair**
Tony Mravle, CEO, KSKJ Life

8:45 a.m. **Insurance CEO Panel**
Moderator: Tony Mravle, CEO, KSKJ Life

Join us in conversation with a panel of LIC Member CEOs, each of whom brings a unique experience and perspective as a company leader, facing opportunities and challenges we all have in common:



Tony Mravle



Chris Campbell



Kim Shaul



Dierdre Woodruff

Chris Campbell, CEO of BetterLife, has vast experience working with large FinTech and Financial Services companies with a focus on marketing and technology enablement. He was President-CEO of eFinancial, the nation's second-largest multi-carrier DTC life insurance agency. BetterLife is a member-owned, community-based society that provides life, annuity and accident products. With BetterLife as a new brand identity, Chris has focused on transformation through productive disruption.

Kim Shaul is the interim President-CEO of National Guardian Life Insurance Company and formerly SVP & General Counsel for NGLIC. The organization is a multi-line mutual insurance company offering life and annuity products, LTC, and preneed, among others. Her deep understanding of the regulatory environment, combined with strong leadership skills, has helped her maintain her leadership team's focus on continuing growth, managing the risks of growth, and supporting the deeply held core values that propel her organization forward. Kim has a unique perspective on succession and adapting her core skills to managing the full enterprise.

Dierdre Woodruff, Sr. Vice President of Puritan Life Insurance Company of America, has been working in the life and health insurance industry for the past 18 years. At her current role as Senior Vice President of Puritan Life, she is responsible for overseeing operations, financial reporting, product development, and compliance activities. Additionally, she has oversight responsibility for each of the service providers that Puritan Life engages. In addition to her position at Puritan Life, she serves as Secretary of Canvas Insurance Agency.

9:45 a.m. **Keynote Address**

Demography is Destiny

Profound Strategic Planning for Uncertain Times

Kenneth W. Gronbach, Author and Futurist in Demography and Generational Marketing

Ken will provide his latest insights on demography and "the math" that will impact the economy and your business! As the markets and geopolitical conditions rapidly change, these insights are crucial to understanding how America's Baby Boomers, Gen X, Gen Y and other countries' age curves interact to create the rapidly emerging opportunities and challenges of the world we live in today. This exciting and informative session will help you understand what the future will bring for people, profits and the planet:

- Culture Evolution
- Technology/AI Implications
- The Labor Pool
- Insurance Products & Services



Ken Gronbach

With this knowledge, IMAGINE ways of adapting or creating new strategies for enduring company success!

11:00 a.m. **Adjourn**

LIC Community Engagement #MeetingsThatMatter

Virtual Food Drive for San Diego

The 2024 LIC Annual Conference is supporting the [San Diego Food Bank](https://www.sanfoodbank.org/). As the regional food safety net, the San Diego Food Bank has been helping the hundreds of families recovering from damage caused by recent flooding, including emergency food distributions serving some of the hardest-hit areas. Donate to the LIC Virtual Food Drive at the link below!

www.loma.org/LICFoodDrive

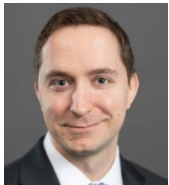


2024 LIC Annual Conference

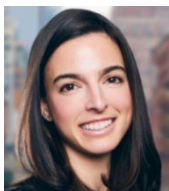
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Confidential: This list is provided to registered attendees of the LIC 2024 Annual Conference to facilitate networking and direct personal communication among attendees. This information may not be added to any database or used for any marketing purposes. (Sponsors will receive a single-use email list to connect with attendees.)



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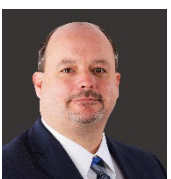
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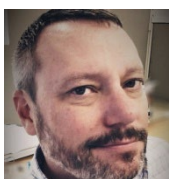
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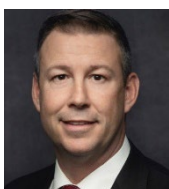
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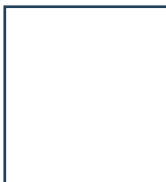
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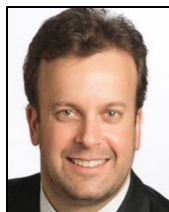
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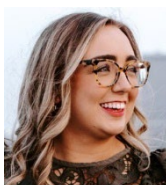
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