



Advancing the Financial Services Industry



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

Advancing the Financial Services Industry

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 services to support its members and the industry.

The evolution continued, and the Secure Retirement Institute® (SRI®) 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 nearly 1,200 members across 71 countries, including most of the world's largest life insurance companies.

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

Connecting People With Solutions

Education & Professional Development

Our professional education, training, and development online courses and in-person virtual and 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.

Facilitated Learning

Individuals and teams come together, either in-person or virtually, for active, collaborative learning through lively discussion and hands-on activities. Our facilitated learning programs, Learning Live, Insurance Immersion, and Strategic Leadership, provide a live, social learning experience with expert instructors, facilitators, and industry peers.

Remote

PROductivity Toolkit

RemotePRO is an industry-specific toolkit geared toward improving virtual employee productivity and success. The toolkit determines which employees have the competencies to thrive virtually, helps leaders recognize and improve virtual workforce management, and provides employees' perspectives on their virtual work environments.

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 and get producers ready to work, quickly and compliantly. They include Best Interest training, Anti-Money Laundering Training, Recognizing Financial Exploitation, and AnnuityXT. Additionally, we offer background checks through our IPC program.

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

Industry connections are at the core of our organization. We bring industry professionals and executives together globally through conferences, committees, study groups, and workshops. Participation in these events with others from the industry — whether live or virtual — provide unique learning and career building opportunities you just can't find anywhere else. Members can hear about best practices and emerging trends from leaders that shape our industry's future.

Creating Talent & Transformative Connections

Supporting Industry Evolution



Industry Solutions

Our focus and extensive member and partner 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 combat account takeover fraud. FraudShare applies analytics to reported fraud instances to generate alerts and provide data, enabling companies to identify fraudsters, take preventive actions, and benchmark their fraud experiences versus their peers. It also includes access to FraudForum, an anonymous, secure community to share a broad range of fraud prevention matters.
- **LDEX Standards** In our work with carriers and benefits administration companies, we perceived a critical need for robust data exchange standards in the workplace benefits industry. In August of 2016, LIMRA began collaborating with key stakeholders to create a standard that encompasses the complexities and unique requirements of the workplace benefits industry. We offer the LIMRA Data Exchange (LDEX) Standards free to the industry. These standards are helping to reduce errors, improve customer experience, and increase speed to market. Our committee continues to construct a roadmap for future enhancement and additional standards.

Research & Data Analytics

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, workplace benefits, individual 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 & Market Intelligence**
Our monthly, quarterly, and annual benchmarks allow you to stay up to date on the latest sales data. Members who participate are able to compare their companies' sales to peer organizations, allowing you to further analyze the market, expand sales, marketing and competitive intelligence, and build your strategy.
- **Strategic Research**
Each year we offer more than 100 research reports on a wide array of topics from the latest industry trends to perennial issues for the industry. Research topics include customer engagement, distribution, technology, workplace benefits, retirement, and individual insurance.
- **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.



Empowering Our Members With Knowledge, Insights, Connections, and Solutions



Next Steps

When you make the right connection, it generates 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

customer.service@limra.com

askloma@loma.org

LL Global, Inc.*

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Secure
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