



# Life Insurance Conference

**Exceeding Expectations**

April 20 – 22, 2020

The Grand America Hotel, Salt Lake City, UT



[www.limra.com](http://www.limra.com)



[www.loma.org](http://www.loma.org)



[www.soa.org](http://www.soa.org)



[www.acli.com](http://www.acli.com)

## General Session Highlights

### Industry Update



**DAVID LEVENSON**

President and Chief Executive Officer  
LIMRA, LOMA, and LL Global, Inc.

### Reshaping an Organization for the Changing Needs of Customers and Employees



**MARGARET MEISTER, FSA**

President and Chief Executive Officer  
Symetra Financial Corporation

Margaret Meister will share her approach to leading change at Symetra to adapt to the shifting needs of customers and the new

generations of employees entering the workforce. Her approach has centered on reshaping Symetra as a company focused on empowering customers and employees.

### Customer Experience Magic



**DUNCAN WARDLE**

Former Head of Innovation & Creativity  
Walt Disney

As Head of Innovation & Creativity at Disney, Wardle helped teams at Disney Parks, Lucasfilm, Marvel, Pixar,

Imagineering, and Animation to innovate, creating amazing experiences for consumers around the globe. Wardle will provide keys to transforming a product-centric culture into a consumer-centric one. Learn how companies can create customer experience magic by deeply understanding their consumer and transforming their culture to achieve amazing results.

### I Am Extraordinary



**MAGIE COOK**

President and Chief Executive Officer  
Magie Cook LLC

Magie Cook transformed herself from an orphan from Mexico into CEO of Maggie's All-Natural Fresh Salsa's & Dips, a company that grew into a multi-million-dollar business within 4 years. At the height of her success in 2015, Maggie's Salsa sold to Campbell's Soup. Shortly after, Cook went back to Mexico and helped rescue 31 orphaned children from a drug cartel. Recipient of a Nobel Entrepreneurial Prize in Mexico, and the Young Entrepreneur of the Year Award from the Small Business Administration, Cook will show you how to spark your creative genius, embrace change, and find meaning while living at your highest potential.

### Keeping Pace in a Rapidly Evolving Insurance Marketplace: The Regulatory Perspective



**JILLIAN FROMENT**

Director  
State of Ohio Department of Insurance



**TODD KISER**

Insurance Commissioner  
Utah Insurance Department



**JOYCE MEYER, Moderator**

Executive Vice President,  
Government Relations  
ACLI

Leaders of the regulatory community will share their insights into how innovation is transforming the insurance marketplace through the lens of a state insurance commissioner. In an interactive session with the audience, they'll share their perspectives on big data/accelerated underwriting, consumer information privacy, risk classification, and a best interest standard of care for annuity sales.



# Program Overview

## ► Monday, April 20

**REGISTRATION** — 11:00 a.m. to 6:30 p.m.

**MEET AND GREET** — 2:30 to 3:00 p.m.

Join us to meet and greet peers while you share ideas and common experiences.

**BREAKOUT SESSIONS** — 3:00 to 4:00 p.m.

**BREAK** — 4:00 to 4:15 p.m.

**BREAKOUT SESSIONS** — 4:15 to 5:15 p.m.

**WELCOME RECEPTION** — 5:15 to 6:30 p.m.

## ► Tuesday, April 21

**REGISTRATION** — 7:00 a.m. to 5:00 p.m.

**CONTINENTAL BREAKFAST** — 7:00 to 8:00 a.m.

**GENERAL SESSION** — 8:00 to 10:00 a.m.

*Industry Update*

**DAVID LEVENSON**

President and Chief Executive Officer  
LIMRA, LOMA, and LL Global, Inc.

*Reshaping an Organization for the Changing Needs of  
Customers and Employees*

**MARGARET MEISTER, FSA**

President and Chief Executive Officer  
Symetra Financial Corporation

*Customer Experience Magic*

**DUNCAN WARDLE**

Former Head of Innovation & Creativity  
Walt Disney

**REFRESHMENT BREAK** — 10:00 to 10:30 a.m.

**BREAKOUT SESSIONS** — 10:30 to 11:30 a.m.

**LUNCHEON** — 11:30 a.m. to 1:00 p.m.

*Sponsored by DXC*

**BREAKOUT SESSIONS** — 1:00 to 2:00 p.m.

**BREAK** — 2:00 to 2:15 p.m.

**BREAKOUT SESSIONS** — 2:15 to 3:15 p.m.

**REFRESHMENT BREAK** — 3:15 to 3:45 p.m.

**GENERAL SESSION** — 3:45 to 4:45 p.m.

*I Am Extraordinary*

**MAGIE COOK**

President and Chief Executive Officer  
Magie Cook LLC

## ► Wednesday, April 22

**CONTINENTAL BREAKFAST** — 7:00 to 8:00 a.m.

**GENERAL SESSION** — 8:00 to 9:00 a.m.

*Keeping Pace in a Rapidly Evolving Insurance Marketplace:  
The Regulatory Perspective*

**JILLIAN FROMENT**

Director  
State of Ohio Department of Insurance

**TODD KISER**

Insurance Commissioner  
Utah Insurance Department

**JOYCE MEYER, Moderator**

Executive Vice President, Government Relations  
ACLI

**REFRESHMENT BREAK AND EXHIBITOR RAFFLE** —  
9:00 to 9:30 a.m.

**BREAKOUT SESSIONS** — 9:30 to 10:30 a.m.

**BREAK** — 10:30 to 10:45 a.m.

**BREAKOUT SESSIONS** — 10:45 to 11:45 a.m.

**CONFERENCE ADJOURNS** — 11:45 a.m.

**2020 LOMA CONFERENCE LUNCHEON** — 12:00 to 2:00 p.m.  
*By Special Invitation*



## Breakout Sessions: Schedule and Tracks

	#	Session Title	Distribution/ Marketing Markets	Admin./ Underwriting	Actuarial/ Product Dev.	Regulatory	Technology
<b>Monday</b>							
3:00 to 4:00 p.m.	1.1	Survey Says...Trends in Accelerated Underwriting		◆	◆		
	1.2	Turning Research Into Awareness — The 2020 Insurance Barometer	◆				
	1.3	The Big Picture: Regulatory and Legislative Landscape in 2020				◆	
	1.4	Digital Transformation — On Track or Slowing Down?					◆
4:15 to 5:15 p.m.	2.1	Data vs. The Actuary: Stories From the Front			◆		
	2.2	What Can Advanced Analytics Do For You?	◆				◆
	2.3	Rise of the Machines: Death of Risk Classes?			◆		
	2.4	How to Deliver Digital Customer Experience Like an InsurTech: Using Legacy Modernization, APIs and Micro-Services					◆
<b>Tuesday</b>							
10:30 to 11:30 a.m.	3.1	What Does Success Look Like in Digital Transformation?					◆
	3.2	Engaging Customers Long Term	◆				
	3.3	How to Design a Successful Accelerated Underwriting Program		◆	◆		
	3.4	Regulatory Compliance in an Evolving Environment — How Regulators Are Tracking Complex Social Issues Through Underwriting Rules				◆	
	3.5	Practical Predictive Analytics — A Collaborative Approach			◆		◆
1:00 to 2:00 p.m.	4.1	Life Insurance Product Update			◆		
	4.2	Consumer Privacy				◆	
	4.3	Customer Experience in Our Industry: What Are Companies Really Doing and Where Is CX Going?	◆				
	4.4	How AI is Transforming Underwriting, Marketing, Sales, Financial Estimations					◆
	4.5	What's the Score? Non-Medical Mortality Scores Revealed		◆	◆		
2:15 to 3:15 p.m.	5.1	Unlocking the Power of Health and Wellness	◆				
	5.2	Artificial Intelligence — Today, Tomorrow, and Beyond		◆			◆
	5.3	Underwriting in 2020 and Beyond: Opportunities and Challenges Impacting Risk Selection		◆	◆		
	5.4	Modernization of Legacy Systems: Will the Journey Ever End?					◆
	5.5	Better Together: Reinvigorating Advisors and Brokers by Modernizing Distribution	◆				◆
<b>Wednesday</b>							
9:30 to 10:30 a.m.	6.1	Toward a Uniform Best Interest Standard of Care				◆	
	6.2	Understanding Life — Linking Insurance Knowledge With Ownership	◆				
	6.3	Keeping Promises — The World of Policyholder Administration		◆	◆		◆
	6.4	In-Force Policy Management	◆				
	6.5	Electronic Health Records — Are We There Yet?		◆			◆
10:45 to 11:45 a.m.	7.1	Suicide Trends and Claims Best Practices		◆	◆		
	7.2	E-App, E-Delivery to E-Everything — Tales From an Insurance Veteran in a Digital World!		◆			◆
	7.3	Diversity and Inclusion	◆				
	7.4	So, You Think You Are a Professional Actuary			◆		

For complete session details, visit <https://www.limra.com/en/events/conferences/2020/2020-life-insurance-conference/#agenda>



## Continuing Education Information

For information on SOA CPD Credit and Continuing Education Credit — U.S. Qualification Standards, please visit the Life Insurance Conference pages at the SOA website: [www.soa.org](http://www.soa.org)

The conference partners, in conjunction with The Society of Financial Service Professionals, are pleased to inform you that attendance at any of the sessions will qualify interested individuals for continuing education credits for the Professional Recertification Program.

## Conference Details and General Information

### Register by March 25 and Save!

#### Early Registration Rates (by March 25, 2020)

LIMRA, LOMA, SOA or ACLI Member: \$1,320  
Nonmember: \$2,640

#### Standard Registration Rates (After March 25, 2020)

LIMRA, LOMA, SOA or ACLI Members: \$1,620  
Nonmember: \$3,240

### REGISTER AND MAKE HOTEL RESERVATIONS ONLINE

[www.limra.com/lifeconf](http://www.limra.com/lifeconf)  
[www.loma.org/lifeconf](http://www.loma.org/lifeconf)  
[www.soa.org](http://www.soa.org)  
[www.acli.com](http://www.acli.com)

### HOTEL INFORMATION

#### THE GRAND AMERICA HOTEL

555 South Main Street  
Salt Lake City, Utah, 84111

**Reservations Phone:** 800.437.5288 (mention the Life Insurance Conference)

### SPONSOR AND EXHIBITOR OPPORTUNITIES AVAILABLE

Contact Kim Hull  
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