Practical Solutions in Financial and Tax Accounting

LIC

LIC Financial & Tax Accounting Committee Conference Call

Via Webex | December 1, 2021, 2-3:30 p.m. EST | www.loma.org/LICACCT

PRELIMINARY AGENDA & ATTENDEE LIST

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

Check In Early! The meeting room will open at 1:45 pm EST so you can check your mic and join in pre-meeting conversation. If you need assistance, email lic@loma.org.

2:00 p.m. **Welcome**

2:15 p.m. **Facilitated Discussion with Live Polling**

Find out what other companies are experiencing and share practical solutions to common challenges. Topics previously submitted are listed below, and attendees are welcome to add topics before or during the call, time permitting.

- RBC impacts from changes to bond factors, real estate factors and longevity risk
- Impact of proposed changes to the Accident and Health Policy Experience Exhibit (AHPEE)
- Principles-based Bond Definition Project - Blanks changes, Health Data redundancy issue, etc.
- What is the status of the LDTI implementation project (Long Duration Targeted Improvements) at your company?
- Who are others using for auditors?
- Tax returns – prepared internally or outsourced to whom?
- Accounting software
- Software Tools for Quarterly and Year-End Processing / Automation

3:30 p.m. **Adjourn**

After the Meeting

Meeting handouts, including slides, polling results, recording, and the final Attendee List, will be posted in the LIC Accounting Committee Online Community at **www.loma.org/LICConnect**. Nonmember attendees will have 7 days' complimentary guest access to download the files and check out this member resource. We encourage you to continue the Q&A with your peers there!

Advance Attendee List

Allen Bailey & Associates - Tom Wurfel, Consulting Actuary, twurfel@allenbailey.com
American Fraternal Alliance - Allison Koppel, CAE, CEO
American Savings Life - Sharna Larson, CPA, Director of Accounting / Controller
Catholic United Financial - Kelly Bretz, FSA, MAAA, CFA, Director of Product and ERM
Exactuals - Sandy Dougherty, MBA, FLMI, Director, Insurance and Corporate Accounts,
Friedland Consulting Services, LLC - Bruce Friedland, MBA, FSA, MAAA, CLU, ChFC, Principal
Kemper Corp - Andrew Edelsberg, CPA, FLMI, VP, Chief of Staff, L&H Finance
Larson & Company - Allison Johnson, CPA, CMA, Senior Audit Manager
Larson & Company - Diane Nesbit, CPA, Partner, dnesbit@larsco.com
Larson & Company - Tori Nickle, CPA, Audit Senior
LIC - Audrey Wittenburg, ALMI, ACS, Associate Director
LIC - Jeff Shaw, CLU, ChFC, Executive Director
Lincoln Heritage Life - Monica Sole, FMLI, ACS, AIRC, ARA, Vice President Government and Industry Relations
National Farm Life Insurance Company - Lis Mechem, FLMI, CPA, VP, Accounting
Royal Neighbors - Tom Myers, CPA, FLMI, CFO & Treasurer
SPJST - Roy Vajdak, CPA, Attorney, Controller
Texas Service Life Insurance Company - George Wise, FSA, Chief Actuary, gwise@tslic.com
thinktum Inc - Jenn McLean, AVP Operations
Thrivent - Tip Tipton IV, CPA, CGMA, Accounting Policy Lead
Trilogy Actuarial Solutions - Douglas Brown, ASA, MAAA, Founding Partner
Woman's Life Insurance Society - Julie Jagoda, CPA, National Treasurer