



Ideas for Growing Your Annuity Business



LIC Annuity Committee Conference Call

Via Webex | September 22, 2021, 2-3:30 p.m. ET | www.loma.org/LICANNUNITY

AGENDA & ADVANCE ATTENDEE LIST

Antitrust Policy: www.loma.org/antitrust

2:00 p.m.

Welcome

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

2:15 p.m.

Annuity Case Study

Greg Felton, CLU, ChFC, FLMI, National Sales Director, National Slovak Society/NSS Life; Stephen Gonzalez, CFA, CPA, Portfolio Manager, AQS Asset Management; and Chris Conklin Conklin, FSA, MAAA, MBA, Managing Director, Miller & Newberg Consulting Actuaries

3:00 p.m.

Facilitated Discussion with Live Polling

Find out what other companies are experiencing and actions they're taking with regard to the COVID-19 pandemic and initiatives/priorities for 2021. Topics will be pre-selected by participants, such as:

- Annuity e-apps
- Strategies for the low interest rate environment
- Annuity customer retention strategies
- Barriers to offering indexed products
- Market and product trends

3:30 p.m.

Adjourn

After the Meeting

Meeting handouts, including slides, polling results, recordings, and the final Attendee List, will be posted in the LIC Annuity 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!

THANK YOU SPONSORS!



Preliminary Attendee List (as of 9/20/21)

1891 Financial Life - Bob Fattore, FLMI, SVP Sales & Distribution

American Savings Life Insurance Company - Michael Frahm, MBA, CFP, LUTCF, AIRC, ARA, FICF, Vice President

AQS Asset Management - Stephen Gonzalez, CFA, CPA, Portfolio Manager

Catholic Life Insurance - Tricia Michalek, FLMI, ACS, ARA, Vice President - Operations

Catholic United Financial - Jack Kerbeshian, FSA, MAAA, Senior Actuary

Catholic United Financial - Kelly Bretz, FSA, MAAA, CFA, Director of Product and Enterprise Risk Management

CSA Fraternal Life - Anna Trush, Team Lead

ELCO Mutual Life and Annuity - Jeff Rasmus, FLMI, AIRC, ARA, ACS, Chief Compliance Officer

ELCO Mutual Life and Annuity - Tim Heaton, ASA, MAAA, Senior Vice President and Chief Strategy Officer

FCSLA Life - Stu Collins, CPA, CFO and Treasurer

Gleaner Life - Barbara Janowski, RN, ALMI, AALU, VP, Insurance Operations & Chief Underwriter

Liberty Bankers Insurance Group - Michelle Clements, FLMI, MBA, SVP Operations

LIC - Audrey Wittenburg, ALMI, ACS, Associate Director

LIC - Jeff Shaw, CLU, ChFC, Executive Director

LIMRA and LOMA - Julý McGlamry, CMP, Senior Event Planner

Miller & Newberg Consulting Actuaries - Chris Conklin Conklin, FSA, MAAA, MBA, Managing Director

National Slovak Society/NSS Life - Greg Felton, CLU, ChFC, FLMI, National Sales Director

Polish Roman Catholic Union of America - Agnes Bastrzyk, Secretary/Treasurer

Sagicor Life USA - Michael Reimann, ALMI, Product Manager

SILAC Insurance Company - Mark Banks, Vice President of Compliance

thinktum - Emily Freure, Business Insurance Analyst

thinktum - Jenn McLean, AVP Operations

Trilogy Actuarial Solutions - Amy Phillips, ASA, Partner

Trilogy Actuarial Solutions - Douglas Brown, ASA, MAAA, Founding Partner

Trilogy Actuarial Solutions - Joshua Gerdes, ASA, MAAA, Founding Partner

Trinity Life Insurance Company - Alvin Begnoche, CLU, ChFC, Vice-President, Marketing

United Benefits - Eduardo Salido, Marketing Manager

William Penn Association - Bob Bisceglia, CLU, ChFC, CLF, LUTCF, National Sales Director