



# CEO Networking: Shared Challenges, Practical Solutions



## LIC Virtual Summer CEO Forum

Hosted by American Savings Life | Tuesday, August 31, 2021 | 10am-3pm EDT

Register at [www.loma.org/LICCEO](http://www.loma.org/LICCEO)

### PRELIMINARY AGENDA

#### 9:30 am EDT **Check-In & Conversation**

#### 10:00 am **Welcome & Attendee Introductions**

Learn about each attendee's current initiatives, biggest challenges, and goals for the meeting.

#### 11:00 am **Customer Experience: Customers Deserve Better**

*Maria Ferrante-Schepis, Maddock Douglas*

*Stuart Johnston, CMO, ManageMy Ltd.*

*Sean Rowley, Dir. Strategy & Proposition, ManageMy Ltd.*

*Chris McGuire, Dir. Client Growth & Engagement, McGuffin Creative Group*

With the unique needs and opportunities of LIC members in mind, some very passionate people from three complementary disciplines have joined forces to present their ideas for helping you realize the full potential of your technology investments, and deliver the customer experiences that are so deeply deserved.

There's no more doubt in the minds of top life insurance industry executives that there is a revolution in customer experience. But this revolution must deliver better outcomes for the customer, for the agent and for the carrier. These outcomes can only be achieved by:

- Modernizing customer and agent communications content and processes
- Removing barriers related to legacy systems
- Focusing the agent experience on what they're good at: advice and sales

Join us for a discussion that will shape a new offering to be created exclusively for LIC members, combining the forces of technology, consumer insight and creative design in a single, turnkey package. Explore how we can ensure our customers/members get the experiences they deserve.

#### 12:00 pm **Break**

#### 1:00 pm **CEOs' Hottest Topics: Facilitated Discussion with Live Polling**

Topics requested by participants include Hiring & Retention Challenges, COVID Impact/New Normal, Investment Strategies, Technology/Automation, Cybersecurity, and more.

#### 3:00 pm **Adjourn**

#### PRELIMINARY ATTENDEE LIST (8/24/21)

5Star Life - Kim Wooding, CPA, CLU, FLMI, Exec VP/CFO  
American Home Life - Steve Lobell, Ch., Pres. and CEO  
American Memorial Life - Tammy Schultz, President  
American Savings Life - Byron Allen, President/CEO  
BetterLife - Dan Shinnick, CEO  
Catholic Order of Foresters - Greg Temple, Pres/CEO  
Catholic Union of Texas, The KJT - Chris Urban, President  
Catholic United Financial - Mike Ahles, Pres/CEO/Chair  
Columbian Mutual Life - Mike Fosbury, CFA, Pres/CEO  
CSA Fraternal Life - John Kielczewski, Pres/CEO  
Cyrus Works - Mike Lewis, CVA, AAMA, CIMA, President  
ELCO Mutual - David Bruce, ALHC, ACS, President  
GPM Life - Peter Hennessey IV, FLMI, LLIF, ExecVP/COO  
Homesteaders Life - Steve Shaffer, CEO  
Illinois Mutual - Katie McCord Jenkins, President  
Investors Preferred Life - Alan Jahde, JD, LL.M, CEO  
KSKJ Life - Tony Mravle, FLMI, PHR, CEO  
LCBA - Doug Tuttle, President & CEO  
Lewer Life - Michael Lewer, President  
Liberty Bankers - Brad Phillips, President & CEO  
LifeShield - David Brooks, CFA, President  
National Farm Life - Kyle McGregor, President & CEO  
Navy Mutual - Admiral Brian E. Luther, Pres & CEO  
Navy Mutual Aid Association - Sangeeta Jacob Jacob, CSO  
Optimum Re - Francois Duguay, Exec VP & Chief Actuary  
Polish Falcons of America - Tim Kuzma, President/CEO  
PRCUA - Jim Robaczewski, National President  
Puritan Life of America - Dierdre Woodruff, Senior VP  
Royal Arcanum - Nick Benoit, COO  
Royal Neighbors - Cynthia Tidwell, FLMI, LLIF, Pres/CEO  
SILAC - Dan Acker, President  
Slovene Nat'l Benefit Soc. - Joe Evanish, Nat'l Pres/CEO  
SWBC Life Insurance Co. - Joan Cleveland, Pres/CEO  
Triple-S Vida - Michael Baez, Executive VP  
United Funeral Dir's Benefit Life - Charlie Allison, Pres  
USAlliance - Jack Brier, President and CEO  
WAEPA - Shane Canfield, CEO