LIC Workshop

Managing Final Expense Profitability

Co-Hosted by Optimum Life Reinsurance Company
Via Videoconference
Tuesday, June 8 and Wednesday, June 9, 2021 | 10 a.m. – 3 p.m. EDT both days

Register at **www.loma.org/finalexpense**

AGENDA & PRELIMINARY ATTENDEE LIST

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

Before the Meeting

1. Submit questions for Live Polling by June 4 to jshaw@limra.com.

2. Registrants will receive Outlook invitations – The Advance Attendee List and Webex/Remo links will be provided in the calendar events.

Monday, June 7, 2021

7-8 p.m. EDT **Pre-Meeting Happy Hour on Remo**
A fun, casual BYOB virtual happy hour for networking before the meeting.

Tuesday, June 8, 2021

9:30 a.m. EDT **Check-In & Conversation**
The Meeting Room will open 30 minutes early both days for A/V checks and conversation.

10:00 a.m. **Welcome & Attendee Introductions**
Jeff Shaw, CLU, ChFC, Executive Director, Life Insurers Council

11:00 a.m. **Foresters Final Expense Case Study Update**
JS Ledoux, ASA, AVP, Product Management North America, Foresters Financial

12:00 p.m. **Break**

1:00 p.m. **Final Expense Facilitated Discussion**
Jeff Shaw, CLU, ChFC, Executive Director, Life Insurers Council
The number-one value cited by LIC conference attendees is the ability to participate in open discussions with peers. Using real-time survey software, we report live feedback on your most pressing questions, with a deeper dive into topics of interest. Provide your questions ahead of time to **jshaw@limra.com**. We'll poll the attendees and lead discussion on everything you always wanted to know about Final Expense but didn't have the opportunity to ask.

3:00 p.m. **Adjourn for the Day**

www.loma.org/finalexpense

Follow on Twitter
#LICmeets

Wednesday, June 9, 2021

9:30 a.m. EDT **Check-In & Conversation**

10:00 a.m. **Final Expense Strategies in the Low Interest Rate Environment**

Mark McDonnell, Senior Portfolio Manager, Optimum Quantvest Corporation

Optimum Re's asset management company, Quantvest, will be speaking on investing during the low interest rate market and ways to make returns on this product line.

11:00 a.m. **LexisNexis "Voice of the Customer" Focus Group Findings**

Scott Rhinehart, Sr. Vertical Market Manager, LexisNexis Risk Solutions

Over the past year LexisNexis has conducted Voice of Customer (VOC) research among several final expense insurers to better understand their pain points and challenges. They found three key areas of focus:

- Fraud prevention—minimizing exposure
- Identity data—ensuring accuracy of data feeding e-apps
- Lapse rates – identifying retention risks

Hear their insights on workflow and best practices to address these pain points. Join in interactive discussion on these issues, including audience feedback via polling.

12:00 p.m. **Break**

1:00 p.m. **American Enterprise/Great Western Final Expense Case Study**

David Munk, CLU, ChFC, VP Product Solutions, American Enterprise Group

2:00 p.m. **LIC Final Expense Survey Results**

Jeff Shaw, CLU, ChFC, Executive Director, Life Insurers Council

Be one of the first to hear the highlights of LIC's annual Final Expense Survey Report with the added benefit of discussing some of the implications of the results with your peers.

3:00 p.m. **Adjourn**

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Apptical
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Benekiva
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PRELIMINARY ATTENDEE LIST

As of May 28, 2021

AIG - Marjorie Ma, MBA, Head of Product Management
American Enterprise Group - Bethany Cross, AVP. Customer Success
American Enterprise Group - Dave Munk, CLU, ChFC, VP Product Solutions
American Enterprise Group - Kim Barney, VP, Chief Administrative Officer
American Enterprise Group - Kyle Nodurft, FSA, AVP Actuary
American Fraternal Alliance - Allison Koppel, CAE, Chief Executive Officer
American Home Life - Shawn Walker, Vice President-Underwriting and Administration
Apptical - Peggy Bartraw, CISM, CDSPE, Director Operations/Information Security
Catholic United Financial - Kelly Bretz, FSA, MAAA, CFA, Director of Product and Enterprise Risk Management
Cincinnati Equitable Life Insurance Company - Greg Baker, CFO
Columbian Financial Group - Alan Igielski, FSA, MAAA, Second Vice President and Actuary
Columbian Financial Group - Rick Relf Jr., FLMI, ALHC, ACS, Senior Vice President, Chief Marketing Officer
Columbian Financial Group - Tammy Marlotte, FLMI, ACS, Second Vice President, Underwriting, Chief Underwriter
Columbian Financial Group - Tariq Hussain, FSA, 2nd VP Actuary and Data Analysis
Foresters Financial - Dianne Fox, ACS, BA.S, Chief Operating Officer-North America Life and Annuity
Foresters Financial - JS Ledoux, ASA, Head of Product Management, North America
Gerry Care - Farron Blanc, CEO
iPipeline - Brian Clark, Director, Strategic Accounts
iPipeline - Naish Berran, Product Sales Specialist
KSKJ Life - Lauren Rainey, ALMI, ACS, Director of Operations
KSKJ Life - Stu Buchanan, FLMI, COO
LexisNexis Risk Solutions - Scott Rhinehart, Sr. Vertical Market Manager
LIC - Audrey Wittenburg, ALMI, ACS, Associate Director
LIC - Jeff Shaw, CLU, ChFC, Executive Director
Management Research Services, Inc. - Tim Dineen, Chief Executive Officer
Milliman - Al Klein, FSA, MAAA, Principal and Consulting Actuary
MRS - Brenda Larson, AMLI, ACS, Director of Life Strategy & Innovation
MRS - GG Oncel, Head of Customer Strategy & Growth
Mutual of Omaha Insurance Company - Matt Nuttleman, FSA, MAAA, Managing Actuary
Optimum Life Reinsurance - Brennen Miller, Business Development Representative
Optimum Life Reinsurance - Monica Clink, FLMI, FLHC, AALU, FFSI, PCS, AAPA, AIRC, ARA, HIA, Vice President Claims
Optimum Life Reinsurance - Terrence Weiser, AVP, Business Development
Optimum Quantvest Corporation - Mark McDonnell, Senior Portfolio Manager
Optimum Re Insurance Company - Dave Barrett, AVP, Undewriting
Optimum Re Insurance Company - Marie-Andree Gagne, ASA, MAAA, Director, Pricing
Prosperity Life Insurance Company - Michal Ryduchowski, FSA, MAAA, SVP, Chief Actuary and CRO
Prudential - Shawn Hilario, Director
ReMark - Steve Gaertner, SVP, Distribution Strategies
RGA - Brian Sibley, FSA, VP, Business Development
RGA - Joe Plut, CLU, ChFC, Executive Director, Business Development
RGA - Matt Fingerhut, Vice President and Actuary
RGA - Michael Friday, CERA, ASA, Executive Director, Business Development
RGA - Michelle Benz, FSA, VP, Business Development
RGAX - Scott Grandmont, CLU, FALU, FLMI, FLHC, COO, Vice President, RGAX
Royal Neighbors of America - Chris Geerts, ASA, MAAA, FLMI, Product Manager
Royal Neighbors of America - Patty Adams, ACS, ALHC, Director, Chief Underwriter
Security National Life Ins. - Guy Winstead, National Sales Director
Security National Life Ins. - Marty Rich, Director of Sales Operations
Texas Service Life - George Wise, Chief Actuary
thinktum inc - Emily Freure, Business Insurance Analyst
thinktum inc - Jenn McLean, AVP Operations
thinktum inc - Tom Murphy, AVP, Technology Delivery
Trilogy Actuarial Solutions - Brett Mushett, FSA, MAAA, Founding 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 Home Life - Mike Kummer, CPCU, Director of Marketing