



LIC Home Service Committee Meeting

Via Webex | Wednesday, August 11, 2021, 10am-3pm EDT

Register at www.loma.org/LICHS

PRELIMINARY AGENDA & ATTENDEE LIST

9:30 a.m. EDT **Greetings and A/V Checks**

We'll be online 30 minutes early so you can check audio and video and catch up with your colleagues. See www.loma.org/webex for LIC's guidelines and tips.

10:00 a.m. **Welcome & Attendee Introductions**

Jeff Shaw, CLU, ChFC, Executive Director, LIC

Each attendee will have an opportunity to share current initiatives, biggest challenges, and goals for the meeting.

11:30 a.m. **Facilitated Discussion: Marketing To Existing Policyholders**

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

1:00 p.m. **Home Service Facilitated Discussion**

Live polling will be used to launch a deeper dive on participant-requested topics such as:

- COVID Impact on Business (underwriting, sales, mortality, lapses, office protocols)
- Incentives (sales conferences, other incentives, virtual sales meetings)
- Customer/Agent Acceptance of Electronic Platforms
- Customer Retention Trend
- Agent Retention and Hiring Tactics

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

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PRELIMINARY ATTENDEE LIST (as of 8/9/2021)

American National Insurance - Wayne Smith, FLMI, ACS, Senior Vice President
American National Insurance - Hoyt Strickland Jr., LUTCF, Executive Vice President
Breathe Life - Emma Williams, Senior Director of Marketing
Columbian Financial Group - Garry Langston, LUTCF, Regional Vice President
Delta Life Insurance company and Delta Fire & Casualty Insurance Company - Don Conn, LUTC, Vice President of Agencies
iPipeline - Brian Clark, Director, Strategic Accounts
iPipeline - Rachel Quigley, Account Manager
Kemper - Dave Clark, FLMI, LUTCF, Regional Vice President
Kemper - Matt Graham, Regional Vice President
Kemper Corporation - Dick Miller, CLU, ChFC, Chief Agency Officer
Kemper Corporation - David Holley, Division Vice President
Kemper Life - David Beck, RVP
Kemper Life - Lyman Moffatt, RVP
Kemper Life - Doug Dixon, Director Agency Administration
Kemper Life - Nour Aly, Regional Vice President
Kemper Life - Terry Robbins, Regional Vice President
Kemper Life - Jason Panchenko, Regional Vice President
Kemper Life - Jose Galiano, VP Operations
Kemper Life - James Carraway, LUTCF, Region Vice President
Kilpatrick Life - Ashlee Lachney, District Manager
KSKJ Life - Angie Schultz, Marketing Project Manager
KSKJ Life - Lisa Kostusik, Supervisor, Agent Services
Liberty Bankers Insurance Group - Todd Stone, Vice President Home Service Division
Liberty Bankers Insurance Group - Robert Koob, Regional Vice President
LIC - Audrey Wittenburg, ALMI, ACS, Associate Director
LIC - Jeff Shaw, CLU, ChFC, Executive Director
Parkway Advisors - Kyle Timmermann, Director of Consulting
Riverside - Alan Mooney, Director
Security National Life - Larry Burton, Regional Manager
Security National Life - Jason Richardson, LUTCF ALMI, Vice President of Home Service Companies
Security National Life - Nathan Laviolette, District Manager
Security National Life - Greg Halcomb, District Sales Manager
thinktum Inc - Jenn McLean, AVP Operations
Trilogy Actuarial Solutions - Douglas Brown, ASA, MAAA, Founding Partner
Trilogy Actuarial Solutions - Brett Mushett, FSA, MAAA, Founding Partner
Triple-S Vida - Michael Baez, MBA, FLMI, AIRC, ACS, ASRI, Executive Vice President