



Updates On the Laws Affecting Your Business



LIC Laws & Legislation Committee Conference Call

~~Thursday, October 14, 2021~~ **DATE CHANGE:** Thursday, October 21, 2:00-3:30 p.m. EDT

AGENDA

I. Welcome

II. Q&A with Brian Casey, Locke Lord:

- A. NAIC Insurance Data Model Law and Consumer Data Privacy Laws (California and other states)
- B. Officer Signatures on Insurance policies and Annuities

III. Update on Litigation, Legislation, and Regulations

Jessica Sever, JD, ALMI, AIRC, ACS, Business Unit Compliance Liaison Director, Assurant

- 1. Unclaimed Property Legislation and Lawsuits (Attachment to come)
- 2. Lost Policy Services
- 3. State Life Insurance Legislation
- 4. Guaranty Association Changes
- 5. NAIC Issues / Industry Issues
- 6. State Issues
- 7. Industry Updates
- 8. Other Items

IV. Additional Questions

- 1. New to Insurance Industry?
- 2. How are carriers addressing NAIC Reg BI?
- 3. What are companies doing to comply with the qualified plan rollover rules?

V. Adjourn

After the Meeting:

Visit www.loma.org/LICConnect for meeting handouts and additional Q&A/resources.

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Preliminary Attendee List (as of 10/15/2021)

- 1891 Financial Life - Patrick Coleman, AIRC, ALMI, FICF, Member Solutions Specialist
- American Enterprise Group - Megan Knapp Smith, Compliance Lead
- American Fraternal Alliance - Allison Koppel, CAE, CEO
- American Fraternal Alliance - Elizabeth Patel, Advocacy and membership manager
- American Savings Life Insurance Company - Michael Frahm, MBA, CFP, CLU, FLMI, AIRC, CCP, Vice President
- BetterLife - Debbie Robaidek, Compliance Manager
- Catholic Life Insurance - Tricia Michalek, FLMI, ACS, ARA, Vice President - Operations
- Catholic Order of Foresters - Chris Nowotarski, JD FLMI, AIRC, General counsel
- Columbian Financial Group - Stacey Boyer, FLMI, Director
- CUNA Mutual - Jessica Sever, Director, Business and Regulatory Compliance
- ELCO Mutual Life & Annuity - Eric Myers, JD, General Counsel

ELCO Mutual Life & Annuity - Jeff Rasmus, FLMI, AIRC, ARA, ACS, Chief Compliance Officer
Gerber Life Insurance Company - Daniel Reinecke Sr., JD/LLM, FLMI, AIRC, ACS, ALHC, CAMS, Senior Compliance Specialist
Gleaner Life - Barbara Janowski, RN, ALMI, AALU, VP, Insurance Operations & Chief Underwriter
Guarantee Trust Life Insurance Company - Joseph Arite, AIRC, FLMI, PHIAS, Director, Legislative Relations
Guarantee Trust Life Insurance Company - Trent Frank, Regulatory Relations Specialist
Locke Lord - Brian Casey, Partner
Prosperity Life Insurance Group - Ann-Kelley Winn, VP- Deputy General Counsel & Chief Compliance Officer
Providence Association - Myron Soltys, FIC, Treasurer/CFO
Puritan Life Insurance Company of America - Dierdre Woodruff, Sr. Vice President
Puritan Life Insurance Company of America - Lida Horn, Compliance Analyst
Royal Arcanum - Nick Benoit, COO
Royal Neighbors of America - John Friederich, General Counsel
Texas Service Life Insurance Company - C.J. Rathbun, FLMI, AIRC, CSA, HIA, CCEP, Compliance Officer
thinktum inc - 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
Woman's Life Insurance Society - Chris Martin, National President
Woman's Life Insurance Society - Vickie Fournier, Director of Member Service