

A Network of Peers Sharing Practical Solutions



LIC Marketing Committee Meeting
Via Webex | Wednesday, July 21, 2021, 10am-3pm EDT
REGISTER AT WWW.LOMA.ORG/LICMKT

AGENDA & PRELIMINARY ATTENDEE LIST

Antitrust Policy: www.loma.org/antitrust

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

We'll be online 30 minutes early so you can check audio and say hello. See www.loma.org/webex for tips.

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

Each attendee will have an opportunity to share their current initiatives and biggest challenges.

11:00 a.m. **Case Study: Launching a New Brand at Teachers Life**

Martha Turner Osborne, Chief Marketing & Sales Officer, Teachers Life

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

1:00 p.m. **Policyowner Marketing and Retention**

Tom Wartenberg, CEO, LSI Group; Bradley Skoda, COO, LSI Group

2:00 p.m. **Facilitated Discussion with Live Polling**

Jeff Shaw, CLU, ChFC, Executive Director, LIC

Find out what others are doing, what's working and what isn't, and discuss common challenges and solutions. Topics will be selected by registrants, such as changes from COVID (permanent vs temporary), recruiting, lead generation, diversity and social justice.

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

PRE-MEETING HAPPY HOUR

Tuesday, July 20, 7-8 pm EDT

Catch up with everyone at this fun, casual BYOB Happy Hour in our "beach club" on Remo! The Remo link will be emailed to registrants as a calendar event.

[Learn about Remo](#)

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As of 7/15/2021

American Benefit Life Insurance Company - Bobby Pierce, CPC, Senior Vice President, Pre-Need
American Fraternal Alliance - Allison Koppel, CAE, Chief Executive Officer
American Fraternal Alliance - Elizabeth Patel, Advocacy and Membership Manager
American Savings Life Insurance Company - Michael Frahm, MBA, CFP, CLU, CCP, FLMI, Vice President
Baltimore Life - Mark Brandt, CLU, ChFC, RHU, CASL, AVP, Market Research and Development
Catholic Union of Texas, the KJT - David Wagner, Vice President
Cyrus Works - Chris Meredith, Chief Business Development Officer
illustrate inc - Lyndon Edwards, President
iPipeline - Michelle Brands, Director, Sales
iPipeline - Sandy Majewski, Director, Sales
Kemper - Matt Graham, Regional Vice President
Kemper Corporation - Michael Wheeler, LUTCF, Divisional Vice President
Kemper Life - Nour Aly, Regional Vice President
Kemper Life - James Carraway, LUTCF, Region Vice President
KSKJ Life - April Sleyko, Vice President, Marketing and Sales
KSKJ Life - Angie Schultz, Marketing Project Manager
Lincoln Heritage Life - Monica Sole, FMLI, ACS, AIRC, ARA, Vice President Government and Industry Relations
Loyal Christian Benefit Association - Matt Barr, LUTCF, VP- Sales & Marketing
LSI Group - Tom Wartenberg, CEO
LSI Group - Brad Skoda, COO
Manage My Limited - Stuart Johnston, Chief Marketing Officer
Parkway Advisors - Kyle Timmermann, Director of Consulting
Polish Falcons of America - Tim Kuzma, President and CEO
Royal Neighbors of America - Scott Kelty, ALMI, Creative Media Specialist
Royal Neighbors of America - Mark Seier, FLMI, Senior Marketing Specialist
Security National Life Ins. - Guy Winstead, VP of Sales
Security National Life Ins. - Marty Rich, Director of Sales Operations
SWBC Life Insurance Company - Joan Cleveland, CLU, ChFC, REBC, President & Chief Executive Officer
Teachers Life - Martha Turner Osborne, Chief Marketing and Sales Officer
Texas Service Life Insurance Company - Susan Thomas, CEO
Texas Service Life Insurance Company - Vince Arena, CMO
Texas Service Life Insurance Company - George Wise, FSA, Chief Actuary
thinktum - Emily Freure, Business Insurance Analyst
thinktum - Tim Girard, Director, Project Management
thinktum - Tom Murphy, AVP, Technology Delivery
Trilogy Actuarial Solutions - Joshua Gerdes, ASA, MAAA, Founding Partner
Trilogy Actuarial Solutions - Douglas Brown, ASA, MAAA, Founding Partner
Trilogy Actuarial Solutions - Brett Mushett, FSA, MAAA, Founding Partner
Trinity Life Insurance Company - Alvin Begnoche, CLU, ChFC, Vice-President, Marketing
Triple-S Vida - Michael Baez, MBA, FLMI, AIRC, ACS, Executive Vice President