



Shared Challenges and Opportunities for Smaller Companies



LIC Operations Committee Meeting (Virtual)

Via Webex | Wednesday, October 6, 2021, 10 am - 3 pm EDT | www.loma.org/LICOPS

PRELIMINARY AGENDA & ATTENDEE LIST

Please review our [Antitrust Policy](#)

Check In Early! The meeting room will open at 9:30 am EDT so you can check your mic and join in pre-meeting conversation.

10:00 a.m. ET **Attendee Introductions**

Hear what's going on at other companies and discuss current challenges.

11:00 a.m. **Case Study:**

Working with an InsurTech

Patrick Viau, Chief Client Officer, Breathe Life

Many insurtechs prefer to work with smaller carriers over large carriers because there is less bureaucracy, greater flexibility, and less likelihood of the carrier trying to replicate the insurtech's model in-house. Hear examples of both good and bad experiences from the insurtech perspective and discuss what carriers can do to better manage a good outcome.

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

1:00 p.m. **Facilitated Discussion with Live Polling**

Operations executives from smaller companies tend to wear multiple hats and face unique challenges. Here's an opportunity to learn from each other: what's working and what isn't, who's doing what, and practical solutions to shared problems. Topics pre-submitted by participants:

- Is your carrier having success with direct-to-customer whole life insurance sales?
- What fundamental changes have been made because of the pandemic?
- What member/policyholder communications are you automating?
- How can fraternal work together to develop insurtech apps or other products to reach new audiences?

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

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As of 10/4/2021

1891 Financial Life - Mary Krutiak, Director Communications
1891 Financial Life - Tu Hornstra, Chief Operations Manager
Allen Bailey & Associates – Tom Wurfel, Consulting Actuary
American Fraternal Alliance - Allison Koppel, Chief Executive Officer
American Fraternal Alliance - Elizabeth Patel, Advocacy and membership manager
American Savings Life Insurance Company - Michael Frahm, Vice President
American Savings Life Insurance Company - Paul Whetten, EVP/COO
BFC - Mark Anderson, National Account Executive
Breathe Life - Patrick Viau, Chief Client Officer
Catholic Life Insurance - Tricia Michalek, Vice President - Operations
Catholic Order of Foresters - Joni Kazmierczak, VP of Business Analysis and IT
Catholic Order of Foresters - Kristin McDaniel, New Business Operations
Catholic Union of Texas, The KJT - Chris Urban, President
Catholic United Financial - Trisha Schilling, Director of Operations
Columbian Financial Group - Kelly Klink, Assistant Vice President, Corporate Projects
ELCO Mutual Life & Annuity - James Huitt, Policy Owner Service Specialist
ELCO Mutual Life & Annuity - Jeff Rasmus, Chief Compliance Officer
Gleaner Life Insurance Society - Barbara Janowski, VP, Insurance Operations & Chief Underwriter
Gleaner Life Insurance Society - Nikki Carson, Senior Systems Analyst
Homesteaders Life Company - Krista Frank, Senior Vice President, Customer Service
iPipeline - Tom Spalthoff, AVP, Sales
Kemper Life - Chris Chandler, Director - LAH Claims
Kemper - Dawn Tahghighi, Director
Kemper - Kevin Vernon, Sr. Manager, Agent Licensing & Field Compensation Operations
Kemper - Rachelle Knau, AVP Policy Administration
KSKJ Life - Stu Buchanan, COO
Liberty Bankers Insurance Group - Michelle Clements, SVP Operations
LIC - Audrey Wittenburg, Associate Director
LIC - Jeff Shaw, Executive Director
Manage My Limited - Stuart Johnston, Chief Marketing Officer
MRS - Brenda Larson, Director of Life Strategy & Innovation
MRS - GG Oncel, Head of Customer Strategy & Growth
Optimum Re - Deb Zimmerman, VP, Operations
Puritan Life Insurance Company of America - Heather Miller, Sr. Business Analyst
QLAdmin Solutions - Kat Correa, Chief Marketing Officer
Royal Neighbors of America - Matt Stoefen, CSC Director
SPJST - Roy Vajdak, Controller
Texas Service Life Ins. Co. - Casey Hughes, Chief Operating Officer
thinktum - Emily Freure, Business Insurance Analyst
thinktum - Jenn McLean, AVP Operations
Trilogy Actuarial Solutions - Amy Phillips, Partner
Trilogy Actuarial Solutions - Douglas Brown, Founding Partner
Trilogy Actuarial Solutions - Joshua Gerdes, Founding Partner
Woman's Life Insurance Society - Vickie Fournier, Director of Member Service