



2021 LIC Preneed Forum Succeeding in Preneed

November 9-10, 2021 | Via Webex, 10am-3pm EST
www.loma.org/preneed

Agenda & Preliminary Attendee List

Tuesday, November 9, 2021

9:30 a.m. EST **Coffee Time: Greetings & 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**

Each attendee will be introduced and invited to share current initiatives and biggest challenges.

10:45 a.m. **Keynote: Your Digital Afterlife Is Now**

Daniel Sieberg, author of *Digital Legacy: Take Control Of Your Online Afterlife* and Co-Founder of GoodTrust

Do you know what happens to your digital stuff when you die? All those thousands of photos, videos, emails, texts, social media posts, accounts, profiles, cryptocurrencies, domain names and so much more? The average person spends 7+ hours per day online in some capacity and creates about 1.8MB of data. All those bits and bytes are now inextricably intertwined with our identity. They tell our stories. They capture our lives. Our digital selves have both real value and real meaning - and real (priceless) memories.



Sieberg

Daniel Sieberg, author of *Digital Legacy: Take Control Of Your Online Afterlife* and Co-Founder of GoodTrust, which is building the future of how to manage your digital afterlife, presents this global and personal issue in a compelling fashion with scientific fact backed up with anecdotal examples. Imagine if you could "communicate" with deceased loved ones through an AI chatbot? Already possible. Or interact with a hologram of your ancestors or famous people from history? Also possible. How should any company - especially those in life insurance - consider this ongoing challenge amidst their revenue models? Sieberg outlines how we got here, the current hurdles, and what lies ahead for businesses, technologists, ethicists, and the rest of us alike.

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Tuesday, November 9, 2021, continued

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

1:00 p.m. **Preneed Facilitated Discussion**

The number-one value cited by LIC conference attendees is the ability to participate in open discussions with peers. This is your chance to share perspectives regarding all aspects of the preneed business in facilitated discussion prompted with live polling. Submit questions in advance to jshaw@limra.com. Topics from last year included:

- Effect on sales process due to COVID; how companies are reacting to selling Preneed when face-to-face interaction is limited due to the pandemic;
- Are companies investing in digital distribution due to pandemic? Are most utilizing a form of E-app? Any other major changes in operations due to pandemic? How are Funeral Homes/Directors adapting to electronic ways of doing business?
- Tele-sales – processes, sales experience, future expectations
- How to get sales back on track post-COVID

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

Wednesday, November 10, 2021

9:30 a.m. EST **Coffee Time: Greetings and A/V Checks**

10:00 a.m. **Innovation in Preneed**

Steve Shaffer, FLMI, CPA, Homesteaders Life Company

Innovation is key to the future both for carriers and consumers in preneed. From the perspective of a 116 year old mutual company, hear an inspiring update on the journey in innovation and ideation.

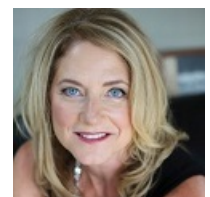


Shaffer

11:00 a.m. **How To Use Data Analytics To Sell Preneed**

Janet Anderson, Head of Insurance Sales, Powerlytics

Powerlytics business data may be used to help define funeral home market share in specific geographic areas. Consumer data may also be used to conduct an analysis of their in force block of preneed policyholders to identify key variables of prospects more likely to purchase their preneed products, and build look-alike models based on their funeral home partners that have been more successful in selling their preneed product. Learn more about how Powerlytics has helped improve marketing for funeral homes – and gain insights into preneed consumers via an analysis of a carrier's inforce block.



Anderson

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

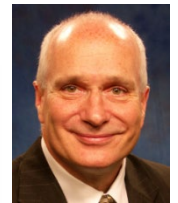
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Wednesday, November 10, 2021, continued

1:00 p.m. **LIC Preneed Survey: A Look Behind the Numbers**

Jeff Shaw, CLU, ChFC, Executive Director, LIC

Discuss the findings of this year's LIC Preneed Survey covering 2020 sales and statutory financial data. See how your company stacks up and trends in the industry.



Shaw

2:00 p.m. **The State of a Precarious Economy:
What Every Preneed Insurer Should Know**

Kyle Timmermann, Director of Consulting, Parkway Advisors

Theron Holladay, CFA, President, Parkway Advisors

Learn more about the economic rebound from Covid and the lasting ramifications that this may have. This presentation will focus on inflation, monetary policy, the growing debt burden, and how to position your investment portfolios for long-term growth – including palpable guidance on investing for a pre-need insurance company. Bring your questions and join in this interactive discussion with industry experts and fellow preneed execs.



Holladay



Timmermann

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



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Attendee List (as of November 8, 2021)

American Benefit Life Insurance Company - Bobby Pierce, Senior Vice President, Pre-Need
American Enterprise Group - Brian Lindquist, Assistant General Counsel
American Enterprise Group - Dave Munk, VP Product Solutions
American Enterprise Group - Ed Croushore, AVP Product Solutions
American Enterprise Group - Kenn Peterson, VP, Sales - Preneed
American Enterprise Group - Kim Barney, VP, Chief Administrative Officer
American Enterprise Group - Megan Knapp Smith, Compliance Lead
American Fraternal Alliance - Allison Koppel, Chief Executive Officer
Benekiva - Brent Williams, Founder & CEO
Benekiva - Ryan Dooley, Director of Operations
Cincinnati Equitable Life Insurance Company - Tom Schrote, Chief Operating Officer
CUNA Mutual Group - Dan Bukenholts, Director, Strategy & Innovation
CUNA Mutual Group - Jessica Sever, Director, Business and Regulatory Compliance
CUNA Mutual Group - Travis Harrelson, Business Development Manager
Cyrus Life Insurance Company - Jeff Smith, CEO
Cyrus Life Insurance Company - Mike Lewis, President, Cyrus Works
ELCO Mutual Life & Annuity - Jim Palm, National Sales Director of Preneed
ELCO Mutual Life & Annuity - Julie Palm, National Sales Director of Preneed
Global Atlantic Financial Group - Karen Hayes, Senior Life Product Development Analyst
GoodTrust - Daniel Sieberg, Co-Founder, Chief Content Officer
Great Western Insurance Company - Jared Dance, Marketing Communication Manager
Guaranteed Funeral Deposits of Canada (GFD) - Heather Kiteley, President & CEO
Homesteaders Life Company - Steve Shaffer, CEO
Homesteaders Life Company - Tom Doruska, Senior VP - Chief Actuary
illustrate, inc - Eric Swanson, VP of Sales
iPipeline - Chris Haffey, Product Sales Specialist
iPipeline - Naish Berran, Product Sales Specialist
LIC - Audrey Wittenburg, Associate Director
LIC - Jeff Shaw, Executive Director
LIMRA - Lauren McCallum, Member Relations Director - Niche Markets & Specialty Accounts
LIMRA and LOMA - Julý McGlamry, Senior Event Planner
Loyal Christian Benefit Association - Matt Barr, VP- Sales & Marketing
Management Research Services - Brenda Larson, Director of Life Strategy & Innovation
Management Research Services - Tim Dineen, Chief Executive Officer
National Guardian Life Insurance - Andrea Rouleau, AVP & Pricing Actuary
National Guardian Life Insurance - Carrie Schable, Senior Manager
National Guardian Life Insurance - Joanna Trygstad, Vice President, Service Operations
National Guardian Life Insurance - John Baker, Vice President, Strategic Partner Development
National Guardian Life Insurance - Judy Olson, Regional Vice President
National Slovak Society/NSS Life - Greg Felton, National Sales Director
Parkway Advisors - Kyle Timmermann, Director of Consulting
Parkway Advisors - Theron Holladay, President
Pekin Life Ins. Co. - Bert Wasson, Assistant Vice President of Preneed Sales
Physicians Mutual - Leigh Klemencic, Marketing Manager

Powerlytics - Janet Anderson, Head of Insurance
Preplanning Solutions, CMFG - Kristina McCollam, Director, Legacy and Growth Operations
QLAdmin Solutions - Kat Correa, Chief Marketing Officer
Security National Life Insurance - Guy Winstead, Vice President of Sales
Security National Life Insurance - Jason Overbaugh, VP
Security National Life Insurance - Marty Rich, Director of Sales Operations
Texas Service Life Insurance Company - George Wise, Chief Actuary
Texas Service Life Insurance Company - Vince Arena, CMO
thinktum Inc - Jenn McLean, AVP Operations
Trilogy Actuarial Solutions - Amy Phillips, Partner
Trilogy Actuarial Solutions - Douglas Brown, Founding Partner
Trilogy Actuarial Solutions - Joshua Gerdes, Founding Partner
United Benefits - Eduardo Salido, Marketing Manager
US Alliance Life and Security Company - Phil Johnson, Senior Director of Company Development/Funeral Homes
US Alliance/Dakota Capital Life - Katherine Pendergast, Director of Company Development