



Growing Your Business Through Supplemental Products



LIC Supplemental Products Committee Conference Call

Via Webex | December 8, 2021, 2-3:30 p.m. EST | www.loma.org/LICSP

PRELIMINARY AGENDA & ATTENDEE LIST

Antitrust Policy: www.loma.org/antitrust

2:00 p.m.

Welcome & 2022 Supplemental Products Committee Meeting Survey Feedback

Check In Early! The meeting room will open at 1:45 pm EST so you can check your mic and join in pre-meeting conversation. If you need assistance, email lic@loma.org.

2:15 p.m.

Facilitated Discussion with Live Polling

Find out what other companies are experiencing and share practical solutions to common challenges. Topics pre-selected by participants:

- Primary Challenges in Supplemental Products
- COVID: Claims, Persistency, and Product Re-Pricing
- Business Processes: Enrollment Support, Heaped Commissions, and Paying Claims via EFT
- Product Features: Most Attractive Benefits, Senior Products
- 2022 Sales Expectations

3:30 p.m.

Adjourn

After the Meeting

Meeting handouts, including slides, polling results, recording, and the final Attendee List, will be posted in the LIC Supplemental Products Committee Online Community at www.loma.org/LICConnect. Nonmember attendees will have 7 days' complimentary guest access to download the files and check out this member resource. We encourage you to continue the Q&A with your peers there!

THANK YOU SPONSORS!



Preliminary Attendee List (as of 12/7/2021)

5 Star Life - Sal Campanile, VP Worksite Voluntary Benefits & Group Sales
Baltimore Life - Mark Brandt, CLU, ChFC, RHU, CASL, AVP, Market Research and Development
Citizens Inc. - Bob Mauldin, CMO
FCSLA Life - Cynthia Maleski, JD, National President/CEO
FCSLA Life - Paul Smithers, CLU, ChFC, National Sales Manager
Guarantee Trust Life - Greg Lev, FSA, MAAA, Actuary
iPipeline - Chris Haffey, Product Sales Specialist
iPipeline - Naish Berran, Product Sales Specialist
Liberty Bankers - Farah Aurelien, VP of Operations
LIC - Audrey Wittenburg, ALMI, ACS, Associate Director
LIC - Jeff Shaw, CLU, ChFC, Executive Director
LifeShield National Insurance Co. - David Brooks, CFA, President
Management Research Services, Inc. - GG Oncel, Head of Customer Strategy & Growth
Management Research Services, Inc. - Tim Dineen, Chief Executive Officer
Manage My Limited - Stuart Johnston, Chief Marketing Officer
Milliman - Robert Eaton, FSA, MAAA, Principal and Consulting Actuary
Milliman - Taylor McKinnon, JD, Compliance Consultant
Royal Neighbors of America - Juliet Christenson, PMP, FLMI, AIRC, ACS, Director Product Strategy and Development
State Mutual Insurance Company - Richard Burton, Vice President
SWBC Life Insurance Company - Joan Cleveland, CLU, ChFC, REBC, President & Chief Executive Officer
Sydney Consulting - Hunter Sexton, JD, MHA, Compliance Consultant
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 - Josh Gerdes, ASA, MAAA, Founding Partner
US Alliance Life & Security Co. - Dwight Huntington, GBDS, Director of Company Development
US Alliance Life & Security Co. - Michael Wederski, GBDS, Distribution and Strategy Team Lead