



Ideas for Growing Your Annuity Business



LIC Annuity Committee Conference Call

Via Webex | April 21, 2022, 2-3:30pm Eastern | www.loma.org/LICANNUITY

AGENDA & PRELIMINARY ATTENDEE LIST

Please review our [Antitrust Policy](#)

I. Welcome

II. Facilitated Discussion with Live Polling

Topics requested by participants include:

- What challenges are companies facing around annuity sales?
How can we help the general public better understand the products? Differences in challenges surrounding deferred vs immediate income annuities
- Why annuitants surrender and strategies for annuity conservation/retention
- New commission strategies
- Annuity e-delivery and tracking receipt
- Successful ways to build relationships with annuity agents, training and communication ideas
- What mitigations do companies have in place for disintermediation risk?
- Market and product trends (variable/index/fixed), latest and potential future indexed annuity features.
- Changes in crediting rates, interest rates for new and inforce business
- PTE 84-24 and the independent insurance agent's disclosure responsibility as opposed that of the annuity carrier's.
- Qualified (IRA) versus Non-Qualified annuities
- Strategies for profitability and competitiveness

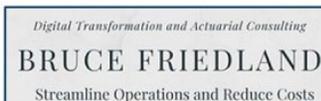
Check In Early! The meeting room will open at 1:45 pm EDT so you can check your audio. If you need assistance, contact lic@loma.org.

III. Adjourn

After the Meeting

Meeting handouts will be posted in the LIC Annuity Online Community at www.loma.org/LICConnect. Nonmembers will have 7 days' complimentary guest access to this LIC member resource.

THANK YOU SPONSORS!



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PRELIMINARY ATTENDEE LIST

American Fraternal Alliance - Allison Koppel, CEO
American Savings Life Insurance Company - Mike Frahm, Vice President
Catholic Financial Life - Linda Hanson, Vice President - Actuary
Catholic Life Insurance - Tricia Michalek, Vice President - Operations
Catholic United Financial - Jack Kerbeshian, Director of Product Management
Catholic United Financial - Kelly Bretz, Director of Enterprise Risk Management
ELCO Mutual - Tim Heaton, SVP, CSO
Friedland Consulting Services, LLC - Bruce Friedland, Principal
Gleaner Life - Barbara Janowski, VP, Insurance Operations & Chief Underwriter
iPipeline - Joe Paddock, Vice President, Sales
KSKJ Life - Amy Bourg, Manager of Operations
KSKJ Life - Angie Schultz, Manager, Marketing & Fraternal
KSKJ Life - April Sleyko, Vice President, Marketing and Sales
KSKJ Life - Lauren Rainey, Director of Operations
KSKJ Life - Stu Buchanan, COO
Liberty Bankers Insurance Group - Michelle Clements, Senior Vice President
LIC - Audrey Wittenburg, Associate Director
LIC - Jeff Shaw, Executive Director
LIMRA - Dararith Ly, Director of Business Development, Commercial Research
Royal Neighbors of America - Renee Graves, Strategic Analyst
Sagicor Life USA - Michael Reimann, Senior Product Manager
SPJST Fraternal Life and Annuities - Delisle Doherty, Vice President
Tapp Solutions - Michael Potter, CEO
Trilogy Actuarial Solutions - Amy Phillips, Partner
Trilogy Actuarial Solutions - Douglas Brown, Founding Partner
Trilogy Actuarial Solutions - Josh Gerdes, Founding Partner
United Farm Family Life Insurance Company - John Selky, Life Product/Market Consultant