



CEO Networking: Shared Challenges, Practical Solutions



LIC Summer CEO Forum

Hosted by Optimum Re, Montréal | August 29-31, 2022

Register at www.loma.org/LICCEO

Meeting Location: Optimum Réassurance, 425 Boul. de Maisonneuve Ouest bureau 1200, Montréal
Recommended Hotel: Delta Hotels Montréal, 475 President-Kennedy Avenue, Montréal

Agenda & Advance Attendee List

Monday, August 29, 2022

- 8-11:30 am **LIC Board Meeting at Optimum**
(Current/Past Board Members Only)
Nicole Dutrisac Conference Room
- 2-5:00 pm **Beyond the Basilica: Guided Walking Tour of Montreal** *(Spouses Welcome)*
Meet in Delta Hotel Lobby at 2 pm to walk to starting point at the Maisonneuve Monument.
- 6:30 pm **Networking Dinner** *(Spouses Welcome)*
Les Enfants Terribles, 1 Blvd Robert-Bourassa
Meet in the Delta Hotel Lobby at 6:15 pm to walk together.

Tuesday, August 30, 2022

- 8:00 am **Continental Breakfast at Optimum**
Le Lounge Optimum, 15th Floor
Meet in the Delta Hotel Lobby at 7:45 am to walk together.
- 8:30 am **Welcome & Attendee Introductions**
- 9:30 am **Break**
- 10:00 am **Facilitated Discussion Topics**
Topics are selected by registrants, including Digital Transformation & Automation, Expanding Distribution Channels, Effective Use of Reinsurance, Workforce Hiring/Retention/ Compensation, Post-Covid Work Structure, Working with IMOs, Covid Impact on Mortality, Investments & Response to Economic Turmoil, ESG, Marketing, Latest Market Developments, New Products on the Horizon, Strategic Development of Management Team.
- 12:00 pm **Networking Luncheon**

Tuesday, August 30, 2022 (continued)

- 1:00 pm **Strategies to Weather the Economic Storm**
JP Morgan Asset Management Panelists: Bob Manning, Portfolio Manager; John Mangas, Investment Specialist; Pat Tuttle, Managing Director; Kevin Zigadlo, Insurance Strategy & Analytics

One of the biggest concerns for CEOs today is the economy, implications for our business, and strategies to help weather the storm. We'll discuss the macro environment, markets impact, and data from JP Morgan's peer analysis work to show how insurers are generating yields and dealing with the current environment.
- 2:30 pm **Adjourn for the Day**

6:30 pm **Networking Dinner** *(Spouses Welcome)*
Ferreira Café, 1446 Rue Peel
Meet in the Delta Hotel Lobby at 6:15 pm to walk together.

Wednesday, August 31, 2022

8:00 am **Continental Breakfast at Optimum**
Le Lounge Optimum, 15th Floor
Meet in the Delta Hotel Lobby at 7:45 am to walk together.

8:30 am **Evolving Distribution Trends**
Kayte Fredrickson, President & CEO, Teachers Life
Jake Tamarkin, CEO, Everyday Life

10:00 am **Facilitated Discussion Continued**

11:00 am **Adjourn**

Advance Attendee List *(as of August 23, 2022)*

American Home Life - Steve Lobell, Ch, Pres and CEO
American Savings Life - Byron Allen, President/CEO
BetterLife - Dan Shinnick, CEO
Catholic Order of Foresters - Greg Temple, President and CEO
CO2 Partners - Lisa Flanary, Executive Coach
Columbian Mutual Life - Mike Fosbury, President & CEO
Converge Re - Ari Lindner, CEO
CSA Fraternal Life - John Kielczewski, President / CEO
CUNA Mutual Group - Tammy Schultz, Pres., Preplanning Solutions
Everyday Life - Jake Tamarkin, CEO
GPM Life - Peter Hennessey IV, Executive VP & COO
Guaranteed Funeral Deposits of Canada - Heather Kiteley, Pres/CEO
Heritage Life - Pete McPherson, Senior Vice President
Homesteaders Life Co - Steve Shaffer, CEO
Humania Assurance Inc. - Marc Peliel, CEO
Investors Preferred Life Ins. Co. - Alan Jahde, CEO
KSKJ Life - Tony Mravle, CEO
Liberty Bankers Insurance Group - Brad Phillips, CEO
Loyal Christian Benefit Assoc. - Doug Tuttle, President & CEO
Navy Mutual Aid Association - Brian Luther, President & CEO
Optimum Re - Francois Duguay, EVP & Chief Actuary
Puritan Life - Dierdre Woodruff, Sr. VP
Royal Neighbors - Curt Zeck, Interim President and CEO
SILAC Insurance Company - Dan Acker, President & CMO
Slovene National Benefit Society - Joe Evanish, National Pres., CEO
Stellar National Life - Nick Argol, CSO
SWBC Life - Joan Cleveland, President & Chief Executive Officer
Teachers Life - Kayte Fredrickson, President & CEO
Texas Service Life Insurance Company - Susan Thomas, CEO
United Funeral Directors Benefit Life - Charlie Allison, President
USAlliance Life and Security Company - Jack Brier, President
UTUIA - Ken Laugel, President / CEO