Ideas for Growing Your Annuity Business

LIC Annuity Committee Meeting

HOSTED BY:

Chicago | October 18-20, 2022 | INFO & REGISTRATION

PRELIMINARY AGENDA & ATTENDEES

Tuesday, October 18, 2022

6:30 p.m. **Networking Dinner at One North Kitchen & Bar**
1 N Upper Wacker Drive, Chicago IL, 60606
Meet in the Hyatt Centric lobby at 6:15 p.m.; it's about an 8-minute walk.

Wednesday, October 19, 2022

8:30 a.m. CT **Continental Breakfast at AAM / Remote Attendee Check-In**

9:00 a.m. CT **Welcome & Attendee Round Robin**
What's the most important thing in your work and/or life today? Hear what's going on with your fellow meeting attendees and get to know each other better.

9:30 a.m. CT **Annuity Investment Update**
Tim Senechelle, Senior Portfolio Manager, AAM
Expert insight and Q&A on investments and yield update across Investment Grade market segments.

THANK YOU TO OUR MEETING SPONSORS!

Wednesday, October 19, 2022

10:30 a.m. CT **Break**

11:00 a.m. CT **Hot Topics in Annuities: Facilitated Discussion**
Live polling will provide a quick answer to questions submitted by participants, serving as a launching point for group discussion.

- Processing Automation
- Product & Market Trends
- Impact of PBR for Annuities & Asset Adequacy Testing Requirements (facilitated by Douglas Brown, Trilogy Actuarial Solutions, and Bill Douglas, First Consulting & Administration)
- Accessing distribution without being a rated organization
- Surrender experience in a rapidly rising rate environment (what have we learned about guaranteed rates from previous cycles?)
- Fixed Annuity Product Trends in High Inflation Environment
- Renewal rate strategies to manage surrender activity
- Service standards – what is considered reasonable or possible

12:00 p.m. CT **Networking Luncheon Hosted by AAM**

1:00 p.m. CT **Facilitated Discussion, Continued**

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

6:30 p.m. **Networking Dinner at The University Club of Chicago**
76 E Monroe St, Chicago, IL 60603 (Northwestern Room, 8th Floor)
Meet in the Hyatt Centric lobby at 6:15 p.m.; it's about a 7-minute walk.

Thursday, October 20, 2022

8:30 a.m. CT **Continental Breakfast at AAM / Remote Attendee Check-In**

9:00 a.m. CT **Case Study: CL Life**
Gary Sorenson, Director, Marketing and Sales, CL Life and Annuity

10:00 a.m. CT **Closing Discussion**

11:00 a.m. CT **Adjourn**

Preliminary List of Registrants (as of October 10, 2022)

AAM - Insurance Investment Management - John Olvany, Principal, Business Development

AAM - Insurance Investment Management - Tim Senechalle, Senior Portfolio Manager

American National Insurance Company - Earl Taylor, FLMI, JD, Senior Counsel (Remote)

Catholic Order of Foresters - Geno Turek, FLMI, CLU, ChFC, RICP, VP, Field Distribution Services

Catholic United Financial - Jack Kerbeshian, FSA, MAAA, Director of Product Management

CL Life and Annuity Insurance Company - Gary Sorensen, CRPC, Director, Marketing and Sales

Converge RE II - Tom Ciavarella, FSA, CERA, MAAA, Director, Actuary

CSA Fraternal Life - Anna Trush, Senior Underwriter

ELCO Mutual - Tim Heaton, ASA, MAAA, Senior Vice President and Chief Strategy Officer (Remote)

FCSLA Life - Cynthia Maleski, J.D., National President/CEO (Remote)

FCSLA Life - Paul Smithers, CLU, ChFC, ChSNC, National Sales Manager

FCSLA Life - Stu Collins, National Treasurer/CFO (Remote)

First Consulting & Administration - Bill Douglas, Senior Product Development Specialist (Remote)

Indiana Farm Bureau Insurance/United Farm Family Life Insurance Company - Edy Gulley, BS in CFP (Consumer Financial Planning), Annuity Representative III (Remote)

iPipeline - Joe Paddock, VP of Sales (Remote)

iPipeline - Mike Deck, Software Sales Director (Remote)

Liberty Bankers Insurance Group - Michelle Clements, FLMI, MBA, Senior Vice President

Liberty Bankers Insurance Group - Tiffany Davlin, AAPA, Manager of Financial Institution Marketing

LIC - Audrey Wittenburg, ALMI, ACS, Associate Director (Remote)

LIC - Jeff Shaw, CLU, ChFC, Executive Director

Polish Falcons of America - Ryan Gregg, CPA, Secretary/Treasurer & CFO (Remote)

Trilogy Actuarial Solutions - Douglas Brown, ASA, MAAA, Founding Partner

Trilogy Actuarial Solutions - Josh Gerdes, ASA, MAAA, Founding Partner

United Farm Family Life Insurance Co. - John Selky, CLU, CLTC, LTCP, Life Product/Market Consultant

UTUIA - Ken Laugel, CEO

Western Catholic Union - Matthew Bainbridge, FLMI, ARA, AIRC, Secretary (Remote)