



# Shared Challenges and Opportunities for Smaller Companies



## LIC Operations Committee Meeting

Hosted by Security National Life | Salt Lake City | September 20-22, 2022 | [REGISTER](#)

Recommended Hotel: Kimpton Hotel Monaco, 15 West 200 South, Salt Lake City, UT 84101 [HOTEL WEBSITE](#)

Meeting Location: Security National Life Insurance Company, 433 Ascension Way, Suite 600, Salt Lake City, UT 84123

## AGENDA & PRELIMINARY ATTENDEE LIST

### Tuesday, September 20, 2022

#### *New Time:*

#### 6:00 p.m. **Networking Dinner**

Squatters Pub Brewery, 147 W Broadway, Salt Lake City, UT 84101

Meet in Hotel Monaco lobby at **5:45 p.m.** to walk to dinner.

### Wednesday, September 21, 2022

#### 8:30 a.m. **Continental Breakfast at Security National Life / Remote Attendee Check-In**

Meet in Hotel Monaco lobby at 8:00 a.m. for carpools to Security National.

#### 9:00 a.m. **Welcome & Attendee Round Robin**

What's the most important thing in your work and/or life today? Hear what's going on for all the meeting attendees.

#### 9:30 a.m. **Case Study: Security National Life**

Jason Overbaugh, Vice President, Security National

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

## THANK YOU TO OUR MEETING SPONSORS!



### Wednesday, September 21, 2022, continued

11:00 a.m. **Hot Operations Topics: Facilitated Discussion**

Live polling will provide a quick answer to questions submitted by participants, serving as a launching point for group discussion. (Poll website: [www.pollevo.com/licmeets](http://www.pollevo.com/licmeets))

- **Staffing/Processing:** Adapting teams to new processes/ automation, Call center organization/metrics/processes, and Identity verification
- **Technology:** Digital transformation and workflow regarding direct to consumer, Customer portal case studies, and IT/Operations partnerships
- **Claims:** Unclaimed property/abandoned property/death master file
- **Miscellaneous:** Reinsurance, Expanding sales, and Inflation/recession

12:00 p.m. **Networking Luncheon/Tour of Security National**

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

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

6:30 p.m. **Networking Dinner**

Caffé Molise, 404 S West Temple St, Salt Lake City, UT 84101

*Meet in Hotel Monaco lobby at 6:15 p.m. to walk to dinner.*

### Thursday, September 22, 2022

8:30 a.m. **Continental Breakfast at Security National Life / Remote Attendee Check-In**  
*Meet in Hotel Monaco lobby at 8:00 a.m. for carpools to Security National Life.*

9:00 a.m. **Using Robotic Process Automation To Build a Portal**

Dana Devine, FALU, FLMI, Director Policyholder and Agent Services, United Home Life  
Krish Krishnan, Founder & CEO, Magnifact

10:00 a.m. **Easy-Peasy AI**

Hari Srinivasan, CEO, iCover

Nicole Mwesigwa, Co-Founder & COO, iCover

Are you wondering how AI can impact life insurance? Nicole explains AI in terms that everyone can understand, and illustrates the transformative power this tech has on new business, underwriting and ops.

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



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### PRELIMINARY ATTENDEE LIST

*As of 9/14/2022*

#### In Person

American Farmers & Ranchers Life Insurance Company - Paul Morgan, Vice President  
American Savings Life Insurance Company - Paul Whetten, EVP/COO  
Atlantic Coast Life - Tom Holland, VP National Accounts  
Columbian Financial Group - Kelly Klink, Assistant Vice President, Corporate Projects and Customer Service  
Equisoft - Michael Zelesnik, Vice President of Insurance Services for the US Market  
iCover - Hari Srinivasan, Founder and CEO  
iCover - Nicole Mwesigwa, Co-founder and COO  
iPipeline - Joe Paddock, Vice President, Sales  
iPipeline - Naish Berran, Sales Director  
Kemper - Rachelle Knau, AVP Policy Administration  
LIC - Jeff Shaw, Executive Director  
Magnifact - Eric Rea, Advisor  
Magnifact - Krish Krishnan, Founder and CEO, Magnifact  
Royal Neighbors of America - Matt Stoefen, CSC Director  
Security National Life - Jon Meredith, Director of Policy Administration  
Security National Life - Marty Rich, VP Marketing and Sales Operations  
Security National Life Ins. - Jason Overbaugh, VP  
SPJST - Roy Vajdak, Controller  
Trilogy Actuarial Solutions - Amy Phillips, Partner

#### Remote

1891 Financial Life - Mary Krutiak, Director Communications  
American Savings Life Insurance Company - Mike Frahm, Senior Vice President  
Betterlife - Michelle Maffet, Vice President, Member Services  
Catholic Life Insurance - Tricia Michalek, Vice President - Operations  
Catholic Order of Foresters - Joni Kazmierczak, VP of Business Analysis and IT  
Catholic United Financial - Trisha Schilling, Director of Operations  
GPM Life - Tonya Carroll, VP, Customer Experience Officer  
KSKJ Life - Amy Bourg, Manager of Operations  
LCBA Life - Brian Young, Director of Customer Experience  
Liberty Bankers Insurance Group - Michelle Clements, Senior Vice President  
LIC - Audrey Wittenburg, Associate Director  
Navy Mutual - Lindsay McFarland, Vice President, Member Services  
Prosperity Life Group - Roxie Latimer, Manager  
Puritan Life insurance Company of America - Heather Miller, Sales Enablement Manager  
Texas Service Life - Kevin Ng, Digital Services Manager  
Texas Service Life Ins. Co. - Casey Hughes, Chief Operating Officer  
Texas Service Life Insurance Company - Deborah Sanchez, VP, Director of Operations  
Texas Service Life Insurance Company - Emy Schuster, Director of Claims  
Toronto Police Widows and Orphans Fund - Sylvi Karr, CEO and President  
United Home Life Insurance Company - Dana Devine, Director Policyholder and Agent Services