



# Strategies for Innovation at Smaller Companies



## LIC Technology Committee Meeting

Hosted by 1891 Financial Life | Schaumburg, IL | October 3-5, 2022 | [REGISTER](#)

Meeting Location: 1891 Financial Life, 200 N Martingale Rd, Schaumburg, IL 60173

Recommended Hotel: Chicago Marriott Schaumburg, 50 N Martingale Rd, Schaumburg IL 60173, [HOTEL WEBSITE](#)

### PRELIMINARY AGENDA & ATTENDEE LIST

#### Monday, October 3, 2022

6:30 p.m. **Networking Dinner at Seasons 52**  
**1770 E. Higgins Rd., Schaumburg, IL 60173**  
*Meet in Marriott lobby at 6:15 p.m. to carpool.*

#### Tuesday, October 4, 2022

8:30 a.m. **Continental Breakfast at 1891 Financial Life**  
*Meet in Marriott lobby at 8:15 a.m. to walk together.*

9:00 a.m. **Welcome & Attendee Introductions**  
*What's the one biggest thing going on in your world?*

9:30 a.m. **Case Study: 1891 Financial Life**  
*Lisa Bickus, CEO of 1891 Financial Life, has gone all in on digital transformation and has been an industry leader in sharing her journey and vision. This is a unique opportunity to do a deep dive on how she sees this transforming the company.*

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

11:00 a.m. **Hot IT Topics: Facilitated Discussion**  
*Topics submitted by attendees, such as:*

- Speed to market implementing new products
- On-premises vs. Cloud, SaaS vs. Hosted
- Managing core systems / transforming IT landscape
- Who's Using What: Cybersecurity Tools/Services
- MFA solutions being used for Windows, Web Services, Portals
- 2023 Top Priorities

12:00 p.m. **Networking Luncheon/Tour**

1:00 p.m. **The Business Case for Technology in a Distressed Economy**  
*Jason Bordui, President & Founder, Balanced Growth Consulting*

#### SPONSORED BY



**Trilogy**  
Actuarial Solutions



**IPIPELINE**  
INNOVATION UNLEASHED

**equisoft**

**thinktium**

**ALLEN BAILEY**  
& ASSOCIATES, INC.  
ACTUARIES • CONSULTANTS



**qla** QLAadmin  
SOLUTIONS

**illustrate inc**

**ManageMy**  
INSURTECH



**zinnia**  
Life. More Open.

**mrs** Management  
Research  
Services.



# Strategies for Innovation at Smaller Companies



## Tuesday, October 4, 2022, continued

- 2:00 p.m.      **Facilitated Discussion, Continued**
- 3:00 p.m.      **Adjourn for the Day**
- 6:30 p.m.      **Networking Dinner at Stonewood Alehouse**  
**601 Mall Dr, Schaumburg, IL 60173**  
*Meet in Marriott lobby at 6:15 p.m. to carpool.*

## Wednesday, October 5, 2022

- 8:30 a.m.      **Continental Breakfast at 1891 Financial Life**  
*Meet in Marriott lobby at 8:15 a.m. to walk together.*
- 9:00 a.m.      **Hidden Secrets of Development and Deployment**  
*Thomas Phillips, Director, Underwriting Innovation & Integration (US), thinktum*  
*Thomas brings a unique perspective from both the business and technology sides of insurance. As a life underwriter with Penn Mutual, he worked on projects to shift the business from exclusively paper to also offering a digital platform. As an underwriter at Aetna, he was involved in exploring how technology such as wearable devices and smartphone apps could supplement underwriting decisions and ratings. At iptiQ, as the AVP of Life and Health Underwriting, a major focus was developing UW automation and creating new life products such as fast issue term and a simplified issue product line. In this presentation, he'll outline the steps and considerations from pre-development to deployment and post-deployment. Thomas will share the differences between different approaches and the real value of insurtech organizations in these processes.*
- 10:00 a.m.      **Facilitated Discussion, Continued**
- 11:00 a.m.      **Adjourn**

## **LIC Technology Committee Meeting**

### **PRELIMINARY ATTENDEE LIST**

*As of September 30, 2022*

1891 Financial Life - Lisa Bickus, CEO  
1891 Financial Life - Mary Krutiak, Communications Director  
Allen Bailey & Associates - Tom Wurfel, FSA, MAAA, Senior Consultant  
American Fraternal Alliance - Allison Koppel, CAE, CEO  
American Savings Life Insurance Co. - James Gilbert, Director of IT  
BetterLife - Don Nieland, FLMI, AIRC, Sr Vice President and Corporate Secretary  
*BetterLife - Jake Illing, Project Manager (Remote)*  
Catholic Order of Foresters - Joni Kazmierczak, VP of Business Analysis and IT  
CSA Fraternal Life - Nick Kosmas, IT Director

*ELCO Mutual Life & Annuity - George Seyter, VP. CISO (Remote)*

ELCO Mutual Life and Annuity - Silvio Rodia, VP/CRO

GPM Life - Gregory Lawler, FLMI, MBA, CIO

illustrate inc - Lyndon Edwards, President

INSTANDA - Guy Williams, Sales Director

iPipeline - Joe Paddock, Vice President, Sales

iPipeline - Naish Berran, Sales Director

LIC - Jeff Shaw, CLU, ChFC, Executive Director

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

*LIDP Consulting Services - Matt Segreti, ALMI, Chief Technology Officer & SVP of Product Development (Remote)*

Manage My Limited - Mark Moran, Chief Product Officer

Management Data, Inc. - Jeremy Bourland, HIAA, MHP, Vice President Business Development

*Puritan Life Insurance Company of America - Megan Duty, MSIM, PMP, Vice President (Remote)*

thinktum - Paul Reaburn, FSA, MAAA, FCIA, CFO

thinktum - Thomas Phillips, Director, Underwriting Innovation & Integration (US)

Zinnia - Jeff Brauner, Sales Director

Zinnia - Martin Roldan, Head of Client Success and Implementation