



# Ideas for Growing Your Annuity Business



## LIC Annuity Committee Meeting

Hosted by GBU Financial Life | Pittsburgh | March 28-29, 2023

Meeting Location: South Hills Country Club, 4305 Brownsville Rd, Pittsburgh, PA 15236

### AGENDA & ATTENDEE LIST

#### Tuesday, March 28, 2023

6:00 p.m. **Networking Dinner at Eddie V's**  
501 Grant Street, Suite 100, Pittsburgh, PA 15219  
*Walkers meet in Embassy Suites lobby at 6:15 p.m.*

#### Wednesday, March 29, 2023

##### **UPDATED START TIME:**

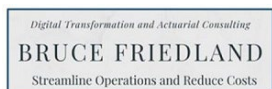
**8:45 a.m. ET** **Welcome & Attendee Introductions** (*Remote Attendee Check-In at 8:30 a.m. ET*)  
**With Continental Breakfast Hosted by GBU Financial Life**  
South Hills Country Club, 4305 Brownsville Rd, Pittsburgh  
*Carpoolers meet in Embassy Suites lobby at 8:15 a.m.*

9:45 a.m. ET **Annuity Case Study: GBU Financial Life**  
Lesley Mann, Chief Marketing Officer, GBU Financial Life  
GBU has grown to become the 5th largest Fraternal in the industry as of 12/31/2022. Learn more about their journey of change and growth along with the lessons learned along the way.

10:45 a.m. ET **Pricing and Product Development Considerations in a Competitive Market**  
Douglas Brown, ASA, MAAA, Founding Partner, Trilogy Actuarial Solutions  
Discussion of topic related to managing pricing and product development in a competitive market. We will also address some management strategies related to thriving in an increasing interest rate environment.



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### Wednesday, March 29, 2023, Continued

11:15 a.m. ET **Hot Annuity Topics: Facilitated Discussion**

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

Topics include:

- Surrender Trends
- Conservation and Pricing Experience with Products with Auto Renewals, Renewal Windows
- Statutory Reserve Issues
- Update on Market Volatility and Investment Strategies
- MYGAs
- Internal Rollovers
- Best Interest Standard of Care and Implementation Challenges

12:00 p.m. **Networking Luncheon and Tour of GBU**

1:30 p.m. ET **Update on Market Conditions**

Theron Holladay, CFA, President / CEO, Parkway Advisors

2:00 p.m. ET **Discussion Topic: Bringing Your First Index Annuity to Market**

Chris Conklin, FSA, MAAA, MBA, Miller & Newberg Consulting Actuaries

2:30 p.m. ET **Facilitated Discussion, Continued**

4:30 p.m. ET **Adjourn**

6:30 p.m. **Networking Dinner at The Commoner (Optional)**

620 William Penn Plaza, Pittsburgh, PA 15219

## Mark Your Calendar!

LIC Annuity Committee Fall Conference Call, November 2, 2023, 2-3:30 pm ET



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### PRELIMINARY ATTENDEE LIST

1891 Financial Life - Meegan Gibbons, CFO (Remote)  
1891 Financial Life - Rob Sharp, Chief Executive Sales Strategist (Remote)  
Allen Bailey & Associates - Tom Wurfel, Senior Consultant (Remote)  
American Savings Life Insurance Company - Mike Frahm, Senior Vice President (Remote)  
American Savings Life Insurance Company - Paul Whetten, Executive Vice President/COO  
Catholic Financial Life - Linda Hanson, Vice President - Actuary (Remote)  
CL Life and Annuity Insurance Company - Gary Sorensen, Director, Sales and Marketing  
Converge Re - Erin Anders, Head of Business Development  
ELCO Mutual Life & Annuity - Tim Heaton, Senior Vice President and Chief Strategy Officer (Remote)  
Equisoft - Michael Zelesnik, Vice President, Insurance Services  
FCSLA Life - Cynthia Maleski, National President/CEO  
FCSLA Life - Kim Graham, National Secretary/COO  
FCSLA Life - Paul Smithers, National Sales Manager  
FCSLA Life - Stu Collins, National Treasurer/CFO  
First Consulting & Administration - Shawna Pope, Senior Product Specialist  
Friedland Consulting Services, LLC - Bruce Friedland, Principal  
GBU Financial Life - Damien Feiklowicz, AVP Business Intelligence  
GBU Financial Life - Doug Ulrich, Vice President/Controller  
GBU Financial Life - Jennifer Stockdale, Director of Marketing and Community Engagement  
GBU Financial Life - Leah Grabiak, Sales Operations Manager  
GBU Financial Life - Lesley Mann, Chief Marketing Officer  
GBU Financial Life - Lisa Henry, Project Manager  
GBU Financial Life - Mark Cloutier, Chief Financial Officer  
GBU Financial Life - Rick Rodriguez, Head of New Business and Underwriting  
Heritage Life Insurance Company - Pete McPherson, Senior Vice President  
iPipeline - Michael Deck, Software Sales Director  
KSKJ Life - April Sleyko, CMO (Remote)  
Liberty Bankers Insurance Group - Michelle Clements, Senior Vice President  
LIC - Audrey Wittenburg, Associate Director  
LIC - Dean Lambert, Executive Director  
LIC - Jeff Shaw, Executive Director (Remote)  
Miller & Newberg Consulting Actuaries - Chris Conklin, Vice President & Consulting Actuary  
National Slovak Society/NSS Life - Greg Felton, National Sales Director  
Parkway Advisors - Theron Holladay, President / CEO  
Parkway Advisors - TJ Holladay Jr., Investment Consulting Strategist (Remote)  
Polish Falcons of America - Ryan Gregg, Secretary/Treasurer & CFO  
Prosperity Life - Ling Lewis, Director, Annuity Product Actuary (Remote)  
Slovene National Benefit Society - Joe Evanish, CEO  
Trilogy Actuarial Solutions - Douglas Brown, Founding Partner  
Trinity Life Insurance Company - Alvin Begnoche, Vice-President, Marketing