



Enterprise Risk Management for Smaller Companies



LIC ERM Committee Meeting

Hosted by Catholic United Financial | St. Paul MN | May 3-4, 2023

PRELIMINARY AGENDA & ATTENDEE LIST

Wednesday, May 3, 2023

1:30 pm CT **Remote Participant Check-In**

2:00 pm CT **Welcome & Attendee Introductions/Activity Reports**

What's the most important news in your life today, personally and professionally? Hear what's going on with the other attendees and get to know your fellow ERM execs.

3:00 pm CT **Case Study: Catholic United Financial**

Paul Zastrow, Senior Vice President and Secretary/Treasurer, Catholic United Financial

Paul Lindemann, CLU, FLMI, ACS, AIRC, Compliance Manager, Catholic United Financial

Learn about Catholic United Financial's ERM journey over the past few years, including work with an outside resource to help build the program and the transition since completion. Hear how it's working for them and lessons learned along the way.

4:00 pm CT **Adjourn for the Day**

6:30 pm CT **Networking Dinner**

Thursday, May 4, 2023

8:30 am CT **Continental Breakfast Hosted by Catholic United Financial (Remote Check-In)**

9:00 am CT **Addressing the Challenges of Being a Small Life Insurer**

Andrew Edelsberg, SVP – Business Strategist, Bruce & Bruce Consulting Actuaries

We'll discuss some of the life industry's strengths and challenges as they pertain to the small-to-midsize life insurer; ERM concepts; case study of risk analysis and ERM actions; how smaller companies can compete in the marketplace; and importance of ratings for life insurers.

10:00 am CT **Facilitated Discussion**

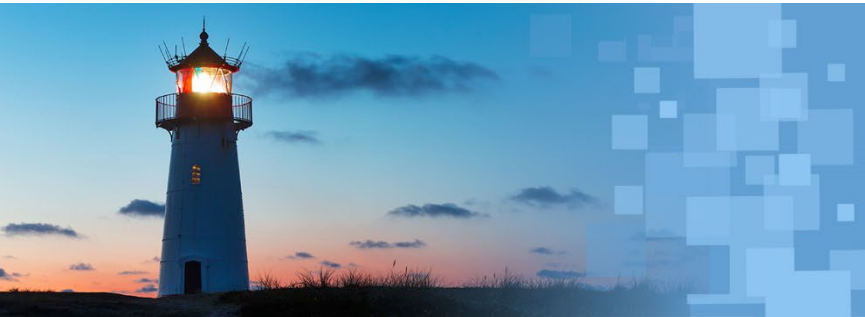
Live polling will provide a quick answer to questions submitted by participants, serving as a launching point for group discussion. Topics will include:

- How are companies using ERM in their Strategic Planning?
- Cybersecurity/ Information Technology Policies
- Data Security
- Stakeholder Engagement/Reputation Risk

11:30 am CT **Meeting Adjourns / Optional Luncheon Hosted by Catholic United Financial**

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SAMPLE ATTENDEE LIST (from last year)

American Farmers & Ranchers Life Insurance Comany - Brandice Rhoades, AVP
American Farmers & Ranchers Life Insurance Comany - Jon Srna, President & CEO
American Farmers & Ranchers Life Insurance Comany - Mark Hayhurst, PMP, Director, Strategic Planning & Operations
American Savings Life Insurance Company - Michael Frahm, MBA, CFP, CLU, CCP, FLMI, Vice President
Assured Life Association - Diane Muller, FLMI, ACS, Secretary/VP of Operations
Assured Life Association - Jerome Christensen, ACS, FLMI, Vice President
Baltimore Life Insurance Co. - Stephen Vincent, FSA, MAAA, CLU, ChFC, AVP
Catholic Order of Foresters - Matt Korienek, ASA, MAAA, Senior Product Actuary
Catholic United Financial - Kelly Bretz, FSA, MAAA, CFA, Director of Enterprise Risk Management
Cohen Strategic Consulting - Mike Cohen, MBA, Principal
Columbian Financial Group - Simone Davis, FFA, FSA, CERA, MAAA, SVP, Chief Actuary and CRO
ELCO Mutual Life and Annuity - Jeffrey Rasmus, FLMI, AIRC, ARA, ACS, Vice President/CCO
ELCO Mutual Life and Annuity - Silvio Rodia, VP/CRO
GPM Life - Wallace Taylor, FALU, CLU, ChFC, FLMI, AIRC, ACS, Vice President, Corporate Underwriting Officer
Heritage Life - Monica Sole, FLMI, ACS, AIRC, ARA, Vice President, Government & Industry Relations
Homesteaders Life - Judith Naanep, FSA, MAAA, CERA, VP Actuarial Services
iPipeline - Joe Paddock, Vice President, Sales
LIC - Audrey Wittenburg, ALMI, ACS, Associate Director
LIC - Jeff Shaw, CLU, ChFC, Executive Director
Lincoln Heritage Life Insurance - Monica Sole, FLMI, ACS, AIRC, ARA, Vice President, Government & Industry Relations
Parkway Advisors - Kyle Timmermann, Director of Consulting
Physicians Mutual - Mark Nelson, FSA, MAAA, CERA, VP Enterprise Risk Management
Teachers Life - Cherisse Norman, MBA, CPA, CMA, Chief Financial Officer/Chief Risk Officer
Trilogy Actuarial Solutions - Amy Phillips, ASA, Partner
Trilogy Actuarial Solutions - Douglas Brown, ASA, MAAA, Founding Partner