



Shared Challenges and Opportunities for Smaller Companies



LIC Operations Committee Meeting

Hosted by Catholic Life | San Antonio | September 26-27, 2023



Meeting Location: Catholic Life, 1635 NE Interstate 410 Loop, San Antonio, TX 78209

Recommended Hotel: Estancia del Norte, 37 NE Loop 410 at McCullough, San Antonio, TX 78216

AGENDA & ATTENDEE LIST

Tuesday, September 26, 2023

1:45 pm *Those interested in carpooling, meet in the Estancia del Norte lobby to depart at 1:45 pm.*

2:00 pm **Welcoming Remarks, Attendee Introductions/Activity Reports**

Christopher Belz, Catholic Life’s Executive Vice President/Corporate Relations, will kick the meeting off with welcoming remarks. Dean Lambert, LIC’s Executive Director, will lead a round robin of Attendee Introductions, a chance to hear about news, priorities, and challenges of your fellow Operations execs.

2:30 pm **Catholic Life Insurance Case Study**

Catholic Life will present a brief case study on their Claims Workflow project under way with Benekiva, including progress so far, and expectation that it will alleviate the challenges they faced with a largely manual claim environment.

3:30 pm **Facilitated Discussion**

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

- Handling Return Mail
- Claims user experience
- Explaining UL Cost of Insurance to customers?
- Vendors to fulfill AML annual training courses
- What changes have been made to pay claims faster if customers are not responding to letters?
- Balancing the benefits of AI and the need for human capital in the customer experience
- Navigate swift technological advances and not so swiftly evolving compliance and regulatory requirements
- Electronic Policy Delivery - who is doing it and challenges to implement?
- Customer and Agent marketing
- Forms management - digital and paper
- Onboarding programs and continuous training
- Death/address check (i.e. Accurint) before mailing out maturity checks

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Tuesday, September 26, 2023 (continued)

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

6:30 pm **Hosted Networking Dinner at Paloma Blanca**
5800 Broadway #300, San Antonio, TX 78209, La Fuente Room
Carpools leave from hotel lobby at 6:15 pm.

Wednesday, September 27, 2023

8:15 am *Carpools leave from hotel lobby.*

8:30 am **Continental Breakfast Hosted by Catholic Life**

9:00 am **E-Signing Solutions Comparison**

Michael Potter, Tapp Solutions

Tapp Solutions recently performed a deep evaluation of 9 different E-Sign vendors. Michael will present the criteria used for the evaluation and how the vendors compared. Both the UI based and API based interfaces to the vendors were evaluated. The evaluated vendors were: Foxit eSign, SignNow, Dropbox Sign, Adobe Sign, DocuSign, OneSpan, UnicornForms, BlueInk, and PandaDoc. This evaluation was performed to support Tapp Solutions' backend integrations with e-sign vendors.

10:00 am **Facilitated Discussion Continued**

Additional discussion topics will continue from Day 1.

11:30 am **Networking Luncheon Hosted by Catholic Life**

12:30 pm **Meeting Adjourns**

For those registered for the LIC Technology Committee Meeting, it will begin at GPM Life at 2pm on Wednesday September 27, 2023. Carpools will leave from the hotel lobby at 1:45 pm.

LIC OPERATIONS COMMITTEE MEETING

PRELIMINARY ATTENDEE LIST (as of 9/22/2023)

Allen Bailey & Associates - Jim Mathur, Actuarial Consultant

Allen Bailey & Associates - Tom Wurfel, President

American Fraternal Alliance - Kendra Ansley, Managing Director (Remote)

American Savings Life Insurance Company - Michael Frahm, Senior Vice President (Remote)

American Savings Life Insurance Company - Paul Whetten, EVP/COO

Balanced Growth Enterprises - Ted Mackenzie, Business Development Executive

Benekiva - Brent Williams, Founder & CEO

Benekiva - James Preston, Sr. National Account Executive

Catholic Life Insurance - Brooke Gullion, Assistant Vice President, Operations

Catholic Life Insurance - Christopher Belz, Executive Vice President/Corporate Relations

Catholic Life Insurance - Frank Gentile, Senior Vice President, Chief Underwriter

Catholic Life Insurance - Heather Kennedy, Membership Service Supervisor
Catholic Life Insurance - Irena Stojan, Claims Director (Remote)
Catholic Life Insurance - Joy Burditt, Assistant Vice President of Operations
Catholic Life Insurance - Lisa Farr, Imaging-Mailroom Supervisor-Operations
Catholic Life Insurance - Mike Belz, President and Chief Executive Officer
Catholic Life Insurance - Peggy Von Kaufman, Assistant Vice President, Operations
Catholic Life Insurance - Sarah Jones, Policy Issue Supervisor
Catholic Life Insurance - Susan Skrzycki, Assistant Vice President, Operations
Catholic Life Insurance - Tricia Michalek, Vice President - Operations
Catholic Life Insurance - Zachary Trevino, Director of Process Improvement
Catholic Order of Foresters - Joni Kazmierczak, VP of Operations
Columbian Financial Group - Kelly Klink, Assistant Vice President, Corporate Projects and Customer Service
CSA Fraternal Life - Nick Kosmas, Interim Secretary / Treasurer
ELCO Mutual Life and Annuity - Bill Bruce, Vice President of Operations
ELCO Mutual Life and Annuity - Paul Grawe, Chief Financial Officer
Equisoft - Michael Zelesnik, Vice President, Insurance Solutions
GPM Life - Debbie Skarda, Vice President Claims and Records
GPM Life - Gregory Lawler, CIO
GPM Life - Jay Moyer, Vice President - Director of Marketing
GPM Life - Pam Hutchins, Senior Vice President and Chief Actuary
Heritage Life Insurance Company - Michelle Casaus, Asst VP of Operations
Hermann Sons Life - Samantha Kelley, Vice President of Operations and COO
illustrate inc - Lyndon Edwards, President
iPipeline - Michael Deck, Software Sales Director
iPipeline - Roy Goodart, VP, Product Management
Kemper - Rachelle Knau, AVP Policy Administration
Kemper - Saud Khan, Leader- MBA Leadership Development Program
KSKJ Life - Lauren Rainey, AVP of Operations
Liberty Bankers Insurance Group - Michelle Clements, Senior Vice President
LIC - Audrey Wittenburg, Associate Director
LIC - Dean Lambert, Executive Director
Manage My Limited - Mark Moran, Chief Product Officer
Management Data, Inc. - Jeremy Bourland, Vice President Business Development
Management Research Services, Inc. - Steve DeLonge, Director of Client Success
Navy Mutual - Lindsay McFarland, Vice President, Member Services (Remote)
NSS Life - Al Burns, Chief Information Officer
Puritan Life insurance Company of America - Heather Miller, VP - Operations
QLAdmin - Greg Garza, CTO & Director of Software Development
QLAdmin - Kat Correa, Chief Marketing Officer
Royal Neighbors of America - Matt Stoefen, CSC Director
Security National Life - Jon Meredith, Director of Policy Administration
Slovene National Benefit Society - Terry Champ, Chief Information Officer
Solutions3000 - Brandon Nichols, Owner
Solutions3000 - Toni Schuster, Owner
SPJST - Brett Wheeler, Senior Accountant (Remote)
SPJST - Roy Vajdak, Controller
Tapp Solutions - Michael Potter, CEO
Trilogy Actuarial Solutions - Amy Phillips, Partner