



# 2023 LIC PRENEED FORUM

## 2023 LIC Preneed Forum

Hosted by National Guardian Life, Madison, WI  
November 15-16, 2023 | [www.loma.org/preneed](http://www.loma.org/preneed)

**Meeting Location:** National Guardian Life, 2 E Gilman Street, Madison, WI 53703

**Hotel Block:** The Edgewater Hotel, 1001 Wisconsin Pl, Madison, WI 53703

## Agenda & Preliminary Attendee List

### Wednesday, November 15, 2023

7:45 a.m. **Registration Opens**

8:00 a.m. **Continental Breakfast Hosted by National Guardian Life**

8:30 a.m. **Welcome & Introductions**

Kim Shaul, Interim CEO, National Guardian Life  
Dean Lambert, Executive Director, LIC

9:15 a.m. **Competitive Market Discussion**

Jeremy Ragsdale, EVP, Chief Marketing Officer, and  
Andrea Rouleau, FSA, MAAA, VP, Actuary, National Guardian Life Insurance Company

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

11:00 a.m. **Demography is Destiny**

*Profound Strategic Planning for Uncertain Times*

Kenneth W. Gronbach, Author and Futurist in Demography and Generational Marketing

*Why is demography important? As waves of generations are born and age, our fortunes and futures are determined. Nationally recognized demographer, futurist, and author Ken Gronbach makes clear how America's Baby Boomers, Generation X, Generation Y and other countries' age curves interact to create the opportunities and challenges of the world we live in today, and what the future will bring for people, profits and the planet.*



Ken Gronbach

## Thank You to Our 2023 Preneed Forum Sponsors!



## 2023 LIC Preneed Forum

Wednesday, November 15, 2023, continued



12:00 - 1:00 p.m. **Networking Luncheon Hosted by National Guardian Life**

1:00 - 2:30 p.m. **Preneed and Funeral Industry Review**

Steve Shaffer, FLMI, CPA, CEO, Homesteaders Life Company

*What's happening in the preneed industry and what the future looks like.*

2:30 - 3:30 p.m. **What's Happening in Preneed? Facilitated Discussion with Live Polling**

*The number-one value cited by LIC conference attendees is the ability to participate in open discussions with peers. We'll use a real-time polling app to report live feedback on your most pressing questions – everything you'd like to ask your peers in the preneed business!*

3:30 p.m. **NGL's DEI Wall & Community Engagement Opportunity**

*See and learn about NGL's new art installation embodying the company's core values of diversity, equity and inclusion.*

*Afterward, join us to make a positive impact in the community where we're meeting. We've selected a local charity that NGL partners with*

*and will be supporting the **Agrace Dori Bears Program**. [Agrace](#) provides supportive care, hospice care and grief support to people who are aging, seriously ill, dying, or grieving. Preneed Forum attendees will be wrapping and tagging teddy bears donated by LIC and NGL, for Agrace to give out to hospice patients and family members. [#MeetingsThatMatter](#)*



[Agrace Dori Bear Program](#)

4:30 p.m. **Break**

5:30 - 6:30 p.m. **Reception in the Sky Bar at Edgewater Hotel**

6:45 p.m. **Networking Dinner Hosted by National Guardian Life at [Eno Venno Downtown](#)**

Thursday, November 16, 2023

8:00 - 8:30 a.m. **Continental Breakfast Hosted by National Guardian Life**

8:30 - 9:15 a.m. **Discussion: Future & Implications of Funeral Home Consolidation**

*What's going on with funeral home consolidation? Let's talk about how this is affecting the industry and how preneed insurers can help deal with the resulting shock waves.*

9:15 - 10:00 a.m. **Effective Decision-Making Under Uncertainty**

Sheldon Bernard, Founder & Chief Decision Architect, A440 Management

*Sheldon Bernard has helped hundreds of company leaders confront complex issues and make better decisions in uncertain times. A pioneer in applied decision sciences, Mr. Bernard will share practical tools for leveraging decision sciences and methods in strategic decision-making.*



Sheldon Bernard

10:00 - 10:15 a.m. **Networking Break**

10:15 - 11:00 a.m. **LIC Preneed Survey Update & Discussion**

*Discuss insights from the latest LIC Preneed Survey and provide input for future research.*

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



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## Preliminary Attendee List (11/3/2023)

Agenium - Tim Dineen, Sr VP  
Atlantic Coast Life/Canada - Tom Holland, VP National Accounts  
Benekiva - Tony Diodato, Chief Revenue Officer  
Cincinnati Equitable - Tom Schrote, Chief Operating Officer  
Converge Re - Erin Anders, Head of Business Development  
Cyrus Life - Bobby Pierce, Executive Vice President of Sales and Marketing  
Cyrus Life Insurance Company - Chris Meredith, Chief Business Development Officer, Cyrus Works  
Cyrus Life Insurance Company - Jeff Smith, CEO, Cyrus Works, President, CLIC, SFFH  
ELCO Mutual Life & Annuity - Jim Palm, National Sales Director of Preneed  
ELCO Mutual Life & Annuity - Julie Palm, National Sales Director of Preneed  
Epoq, Inc. - Clifford Cohen, Business Development Director  
Equisoft - Michael Zelesnik, Vice President, Insurance Solutions  
Family Liberty Life - Fred Meisenheimer, Chief Operations Officer  
Global Atlantic Financial Group - Nicholas Pucci, AVP, Preneed Product Actuary  
Guaranteed Funeral Deposits of Canada (GFD) - George Janchev, Director of Marketing  
Guaranteed Funeral Deposits of Canada (GFD) - Heather Kiteley, President & CEO  
Heritage Life Insurance Company - Kyle Cummings, VP - Finance & Actuarial  
Homesteaders Life Company - Jill Muenich, VP-Independent Distribution  
Homesteaders Life Company - Michelle Hartley, Director of Partner Success  
Homesteaders Life Company - Pam Kleese, Director, Research & Insights  
Homesteaders Life Company - Steve Shaffer, CEO  
INSTANDA - Naish Berran, VP of Sales  
iPipeline - Joe Paddock, Vice President, Sales  
iPipeline - Michael Deck, Software Sales Director  
LCBA Life - Brian Young, Director of Customer Experience  
National Guardian Life Insurance Company - Andrea Rouleau, VP, Actuary  
National Guardian Life - Drew Prenli, AVP Customer & Distribution Solutions  
National Guardian Life Insurance Company - Jeremy Ragsdale, EVP, Chief Marketing Officer  
National Guardian Life - Jerie Olson, VP Operations  
National Guardian Life Insurance Company - Jessi Booker, RVP, Sales  
National Guardian Life Insurance Company - Jessica Grann, SVP, Chief Culture and Communications Officer  
National Guardian Life Insurance Company - Judy Olson, Vice President, Sales and Business Development  
National Guardian Life Insurance Company - Kim Shaul, Interim CEO  
National Guardian Life Insurance Company - Rob Heins, Regional Vice President  
National Slovak Society/NSS Life - Greg Felton, National Sales Director  
O. H. Pye, III Funeral Home - Rita Jordan, Director - Advance Planning  
Parkway Advisors - Theron Holladay, President / CEO  
Pekin Life Ins. Co. - John Campbell, AVP of Preneed Sales  
Physicians Mutual - Leigh Klemencic, Director – Preneed  
QLAdmin - Greg Garza, CTO & Director of Software Development  
QLAdmin - Kat Correa, Chief Marketing Officer  
Security National Life Insurance - Guy Winstead, Vice President  
Security National Life Insurance - Marty Rich, VP Marketing & Sales Operations  
Tapp Solutions - Michael Potter, CEO  
Trilogy Actuarial Solutions - Amy Phillips, Partner  
TruStage Preplanning Solutions - Christopher Roe, SVP-Corporate & Legislative Affairs  
TruStage Preplanning Solutions - Fernand LeBlanc, VP, Strategy and Innovation  
TruStage Preplanning Solutions - Karim Habib, VP, Strategic Partnerships & Sales  
TruStage Preplanning Solutions - Nathan Moenck, Associate General Counsel  
Tukios Inc - Micah Spicer, VP Channel Development  
United Benefits - Eduardo Salido, Chief Marketing Officer  
Wellabe - Ed Croushore, VP, Product Solutions  
Wellabe - Jenn Sopcich, Product Manager  
Wellabe|Great Western Insurance Company - Al Whitmer, Director National Sales Distribution