



CEO Networking: Shared Challenges, Practical Solutions



LIC Summer CEO Forum

The Chateaux Deer Valley, Park City, UT | August 28-30, 2023 | www.loma.org/LICCEO

Agenda & Preliminary Attendee List

Monday, August 28, 2023

8-11:30 am **LIC Board Meeting with Continental Breakfast**
(Current/Past Board Members Only)

1-9:00 pm **Heber Valley Artisan Cheese Tasting, Tour and Dinner** (Spouses Welcome)

Enjoy this specially curated side trip with a hands-on experience at this century-old family dairy operation nestled in the quaint community of Midway, Utah! Heber Valley Artisan Cheese is a small dairy farm and creamery owned by the Kohler family. Our tour includes dairy operations and cow-milking, production of Heber Valley's creamery products, and tastings of their award-winning, hand-crafted artisan cheese. Truly an experience you won't want to miss!



Bus transportation will leave from the Chateaux Lobby at 1 pm. The tour will be 2-4 pm, followed by an opportunity to visit the farm store. A cocktail reception will begin at 5 pm, followed by picnic dinner under the pavilion and bus transportation back to the Chateaux.

Community Engagement: [Adopt-A-Native-Elder](#) is a Salt Lake City based organization working to help reduce the extreme poverty and hardship faced by traditional Elders living on the Navajo Reservation. Attendees who would like to participate will receive a basket to shop in the farm store for food to be delivered to Navajo Elders. Hand-crafted Navajo items will also be available for purchase, with 100% of the asking price going directly to the artist.

Tuesday, August 29, 2023

8:00 am **Continental Breakfast**

8:30 am **Welcome & Attendee Introductions**

9:30 am **Networking Break**

10:00 am **Disruption: A 360° Review**

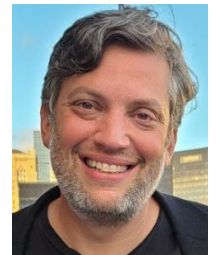
Led by Nick Gerhart, EVP-Chief Innovation Officer, Homesteaders Life Company, this interactive and provocative panel discussion will dive into the meaning of disruption (and whether some of the hype companies may be more capable of implementing disruptive strategies despite resource constraints, key partnerships, and incorporating disruption initiatives into strategic planning. Areas of disruption include AI, alternative distribution, product disruptions, and InsureTech. Panelists include Yaron Ben-Zvi, former founder of Haven Life and insurtech business builder, and Matthew C. Mitchell, PhD, Partner at Bâton Global and professor at Drake University, helping empower organizations to succeed in a rapidly globalizing world.



Nick Gerhart



Matthew Mitchell



Yaron Ben-Zvi

hasn't materialized), how smaller companies may be more capable of implementing disruptive strategies despite resource constraints, key partnerships, and incorporating disruption initiatives into strategic planning. Areas of disruption include AI, alternative distribution, product disruptions, and InsureTech. Panelists include Yaron Ben-Zvi, former founder of Haven Life and insurtech business builder, and Matthew C. Mitchell, PhD, Partner at Bâton Global and professor at Drake University, helping

12:00 pm **Networking Luncheon with Disruption Panelists**

1:00 pm **CEO Workshop: Finding Focus in a World of Chaos**

Chaos affects every person at every level of business. There's always more work, and never enough time. This chaos takes its toll on friends, families, coworkers, and health. If you feel like everything's moving too fast, you're not alone. But there is a solution, and it's surprisingly simple. Acclaimed small business and time management expert Dave Crenshaw digs deep into his humorous and touching experiences of being off-the-charts ADHD and his work coaching



Dave Crenshaw

successful leaders worldwide. In this interactive workshop, Dave will help you regain control and improve the quality of your work, all while feeling more balance and happiness in your life and career!

[Dave Crenshaw](#) develops productive leaders in Fortune 500 companies, universities, and organizations of every size. He has appeared in Time magazine, USA Today, FastCompany, and the BBC News. His [courses on LinkedIn Learning](#) have been viewed tens of millions of times. His five books have been published in eight languages, the most popular of which is [The Myth of Multitasking](#)—a time management bestseller. As an author, speaker, and online instructor, Dave has transformed the lives and careers of hundreds of thousands around the world.

2:30 pm **Adjourn for the Day**

6:30 pm **Networking Dinner at Chateaux Deer Valley** (*Spouses Welcome*)

[Wednesday, August 30, 2023](#)

8:00 am **Continental Breakfast**

8:30 am **Discussion: Agent Incentive Programs**

What are companies doing to motivate agents beyond compensation? Engagement and incentive programs have become table stakes for attracting and motivating top distributors. Leading the discussion will be Kate White and Dana Hageman, top incentive strategists with ITAGroup, a leader in designing and executing solutions that motivate channel partners, employees and customers anywhere in the world.

10:00 am **Facilitated Discussion with Live Polling**

Remaining questions and new issues raised by this week's content will be covered in our closing session, with live polling to help launch discussions. Requested topics include:

- Artificial Intelligence
- Regulatory updates, progress in ESG, DEI
- Economy and investment forecast
- Life & Annuity Sales, Distribution
- Senior Management Recruiting

11:00 am **Adjourn**

[Advance Attendee List](#) (*as of July 28, 2023*)

1891 Financial Life - Lisa Bickus, CEO
American Savings Life Insurance Company - Byron Allen, President/CEO
BetterLife - Chris Campbell, CEO
Catholic Life Insurance - Christopher Belz, Executive Vice President/Corporate Relations
Catholic Order of Foresters - Gregory Temple, President and Chief Executive Officer
CL Life and Annuity Insurance - Richard Hodgdon, President/CEO
Columbian Mutual Life Insurance Company - Mike Fosbury, President & CEO
Converge Re - Erin Anders, Head of Business Development
CSA Fraternal Life - John Kielczewski, President / CEO
ELCO Mutual Life and Annuity - David Bruce, President
GPM Life - Peter Hennessey IV, Executive VP & COO
Heritage Life Insurance Company - Peter McPherson, Senior Vice President
Homesteaders Life Co - Steve Shaffer, CEO
Investors Preferred Life Ins. Co. - Nikki Pethtel, President & CFO
KSKJ Life - Tony Mravle, President & CEO
Liberty Bankers Insurance Group - Brad Phillips, Chief Executive Officer
Loyal Christian Benefit Association - Douglas Tuttle, President and CEO
Navy Mutual Aid Association - Brian Luther, President & CEO
Optimum Life Reinsurance - Francois Duguay, EVP & Chief Actuary
Puritan Life Insurance Company of America - Dierdre Woodruff, Sr. Vice President
Royal Arcanum - Nicholas Benoit, COO
Security National Life - Jason Overbaugh, VP
SILAC Insurance Company - Dan Acker, President & Chief Marketing Officer
SILAC Insurance Company - Rudy Mehl, Vice President, Sales
Slovene National Benefit Society - Joseph Evanish, CEO
SWBC Life Insurance Company - Joan Cleveland, President & Chief Executive Officer
Texas Service Life Insurance Company - Susan Thomas, CEO
Toronto Police Widows and Orphans Fund - Sylvi Karr, CEO and President
TruStage - Tammy Schultz, President, Preplanning Solutions
TruStage - Fernand LeBlanc, VP, Strategy and Innovation
United Benefits - Charlie Allison, President