



# LIC Winter CEO Forum

[www.loma.org/LICCEO](http://www.loma.org/LICCEO)

Wyndham Grand at Harbourside Place, Jupiter, FL  
January 31 - February 1, 2023



The industry's only forum for CEOs of insurance companies with limited resources to share practical solutions and develop a close personal network of peer CEOs.

## AGENDA & PRELIMINARY ATTENDEE LIST

### Tuesday, January 31, 2023

- 8:00-8:30 a.m. **Continental Breakfast**
- 8:30-10:30 a.m. **Welcome, Introductions & Activity Reports**
- 10:30-11:30 a.m. **Networking Break**
- 11:00 a.m.-12:00 p.m. **LIMRA and LOMA Discussion**  
John Carroll, Senior VP and Head of Insurance and Annuities - U.S. & Canada, LIMRA and LOMA
- 12:00-1:00 p.m. **Networking Luncheon**
- 1:00-3:00 p.m. **Facilitated Discussion with Live Polling**  
The LIC CEO Forum offers a unique opportunity to discuss your biggest challenges with other small-to-midsize life insurance company CEOs. Topics requested so far include:
- Annuity Product & Rate Trends
  - Regulatory Issues
  - Continuing Impact of COVID
  - Investment Strategies in Current Environment
  - Distribution Challenges & Opportunities
- 3:00 p.m. **Adjourn for the Day**
- 6:30-8:30 p.m. **Hosted Networking Dinner with the LIC Board (Spouses Welcome)**  
[The Woods Restaurant](#), 129 Soundings Ave., Jupiter, FL

### Wednesday, February 1, 2023

- 8:00-8:30 a.m. **Continental Breakfast**
- 8:30-9:30 a.m. **InsurTechs and How Smaller Life Companies Can Partner with Them**  
Tony Lew, Co-Founder & Managing Director, InsurtechNY
- 9:30-9:45 a.m. **Networking Break**
- 9:45-11:00 a.m. **Facilitated Discussion with Live Polling (continued)**
- 11:00 a.m. **CEO Forum Adjourns**
- 6:00-7:00 p.m. *LIC Annual Meeting Kick-Off Reception - see [www.loma.org/LIC2023](http://www.loma.org/LIC2023)*

## PRELIMINARY LIST OF ATTENDEES

As of 1/16/2023

1891 Financial Life - Lisa Bickus, CEO  
 American Farmers & Ranchers Life Insurance Company - Brandice Rhoades, VP  
 American Fraternal Alliance - Allison Koppel, CEO  
 American Home Life Insurance Company - Steve Lobell, CEO  
 American Savings Life Insurance Company - Byron Allen, President/CEO  
 BetterLife - Craig Van Dyke, President & Chief Investment Officer  
 BetterLife - Dan Shinnick, CEO  
 Catholic Life Insurance - Christopher Belz, Executive Vice President/Corporate Relations  
 Catholic Order of Foresters - Greg Temple, President and Chief Executive Officer  
 Cincinnati Equitable Life Insurance Company - Tom Schrote, Chief Operating Officer  
 CL Life and Annuity Insurance Company - Rick Hodgdon, President/CEO  
 Columbian Mutual Life Insurance Company - Mike Fosbury, President & CEO

Converge Re - Ari Lindner, CEO  
CSA Fraternal Life - John Kielczewski, President / CEO  
Cyrus Life Insurance Company - Chris Meredith, Chief Business Development Officer, Cyrus Works  
ELCO Mutual Life & Annuity - Paul Grawe, Chief Financial Officer  
Gerber Life Insurance - Keith O'Reilly, President & CEO  
GPM Life - Peter Hennessey IV, Executive VP & COO  
Heritage Life Insurance Company - Pete McPherson, Senior Vice President  
Homesteaders Life Co - Steve Shaffer, CEO  
InsurTech NY - Tony Lew, Co-Founder & Managing Director (Speaker)  
Investors Preferred - Alan Jahde, Executive Chairman  
KSKJ Life - Tony Mravle, CEO  
Liberty Bankers Insurance Group - Eric Johansson, EVP and Chief Operations Officer  
LIMRA and LOMA - John Carroll, Senior VP and Head of Insurance and Annuities - U.S. and Canada (Speaker)  
Loyal Christian Benefit Association - Doug Tuttle, President and CEO  
Navy Mutual Aid Association - Brian Luther, President & CEO  
Optimum Re - Francois Duguay, EVP & Chief Actuary  
Puritan Life Insurance Company of America - Dierdre Woodruff, Sr. Vice President  
Security National Life Ins. - Jason Overbaugh, VP  
Serenia Life Financial - Duane Zappitelli, VP, Sales and Distribution  
Slovene National Benefit Society - Joe Evanish, CEO  
SWBC Life Insurance Company - Joan Cleveland, President & Chief Executive Officer  
Texas Service Life Insurance Company - Susan Thomas, CEO  
TruStage - Tammy Schultz, President, Preplanning Solutions  
United Benefits, Inc. - Charlie Allison, President  
USAlliance Life and Security Company - Jack Brier, President  
Curt Zeck, Insurance Exec