



# Updates On the Laws Affecting Your Business



## LIC Laws & Legislation Committee Conference Call

Friday, May 5, 2023, 2:00-3:30 p.m. EDT

### AGENDA & ATTENDEE LIST

#### I. Welcome

Dean Lambert, Executive Director, LIC  
Audrey Wittenburg, Associate Director, LIC

#### II. Update on Litigation, Legislation, and Regulations (Attachment)

Kathy O'Farrell, Regulatory Affairs Manager,  
First Consulting & Administration

- A. Market Conduct Items (p. 1)
- B. Lawsuit of Interest (p. 2)
- C. Industry Information (p. 3)
- D. Adopted Laws & Regulations (p. 3)

#### III. Additional Topics

#### IV. Adjourn



### ADVANCE ATTENDEE LIST

- Barbara Janowski, RN, ALMI, AALU, VP, Insurance Operations and Chief Underwriter, Gleaner Life
- Brian Casey, Partner, Locke Lord LLP
- Brian Lindquist, Senior Assistant General Counsel, American Enterprise group
- Christopher Nowotarski, FLMI FSLI, General Counsel, Catholic Order of Forester
- Christopher Zwart, ALMI, AIRC, ACS, Senior Product Compliance Analyst, Columbian Financial Group
- Douglas Brown, ASA, MAAA, Partner, Trilogy Actuarial Solutions LLC
- Eric Myers, JD, General Counsel and Corporate Secretary, ELCO Mutual Life and Annuity
- Jaime Waters, Senior Vice President Compliance, Liberty Bankers Insurance Group
- Jenna Austin, Assistant General Counsel, Heritage Life Insurance Company
- Jessica Sever, Director, Business and Regulatory Compliance, TruStage
- John Friederich, General Counsel, Royal Neighbors fo America
- Kathryn O'Farrell, Regulatory Affairs Manager, First Consulting
- Kristin Gemski, VP, Deputy General Counsel, SBLI USA Life Insurance Company, Inc.
- Matt Barr, LUTCF, VP- Sales & Marketing, Loyal Christian Benefit Association
- Megan Knapp Smith, Compliance Lead, American Enterprise Group
- Megan Leivant, VP Medical Director, RGA
- Melanie Netzer, FLMI, ARA, HIAA, ICA, Vice President, Client Services, Optimum Re
- Michael Frahm, MBA, CFP, CLU, CCP, FLMI, Senior Vice President, American Savings Life Insurance Company
- Monica Sole, FLMI, ACS, AIRC, ARA, VP, Government & Industry Relations, Lincoln Heritage Life Insurance
- Stephen Cheeseman, JD, LLB, ACAMS, C-IAPP, Head of Legal & Compliance, thinktum inc
- Todd Martin, Outside General Counsel, American Fraternal Alliance
- Tricia Michalek, FLMI, ACS, ARA, Vice President - Operations, Catholic Life Insurance
- Wendy Walker, Compliance Manager, SBLI USA Life Insurance Company, Inc.
- Will Laurence, Investment Accountant, Parkway Advisors