

We chose “**Imagine!**” as the theme of the 2024 LIC Annual Conference because that’s what it takes to thrive, compete and grow today and into the future. We have created an agenda and environment to catalyze forward-thinking imagination and discussion about new technologies, consumer perceptions, expectation and needs; plus new ways to manage in a world that seems to accelerate faster every year. We’ll hear from companies and individuals who have a unique perspective on growth and innovation, and we’ll engage in interactive sessions designed to send everyone home with practical ideas that can be implemented to help your company succeed.

After attending the LIC Annual Conference, you should be refreshed, excited, and equipped with new tools to help make 2024 your best year ever. **Imagine that!**

LIC ANNUAL CONFERENCE

AGENDA & PRELIMINARY ATTENDEE LIST

Wednesday, February 7, 2024

- 6:00 p.m. Opening Reception & Registration
- 7:00 p.m. Dinner On Your Own

Thursday, February 8, 2024

- 8:00 a.m. Networking Breakfast
- 8:30 a.m. Welcome from LIC’s Board Chair
Steve Shaffer, CEO, Homesteaders Life Company

- 8:45 a.m. Keynote Address
- The Result: The Practical, Proven Formula for Getting What You Want**
Dave Crenshaw, Founder & CEO, Invaluable, Inc.

What big-impact, game-changing result are you looking to achieve? In this interactive presentation Dave Crenshaw will unveil the secret, simple, and potent formula of The Result. You’ll gain a practical tool you—and others in your company—can use to consistently obtain success. Takeaways include:

- A problem-solving solution that can drive organizational growth
- How to develop a culture of effective coaching
- Techniques to motivate and empower your team, anticipate roadblocks, and strategize your success.

As an author, speaker, and online instructor, [Dave Crenshaw](#) has transformed the lives and careers of hundreds of thousands around the world. 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, including time management bestseller [The Myth of Multitasking](#).

- /10:00 a.m. Networking Break
- 10:30 a.m. Innovative Approach to Serving the 62+ Age Group
Kevin Nazemi, CEO, and Nick Shutwell, SVP of Growth & Distribution, Charlie Financial

Pre-Meeting Event
LIC Winter CEO Forum
The Westgate Hotel, San Diego
February 6-7, 2024

Life insurance company CEOs and Presidents are invited to network and discuss strategic issues and solutions one day before the LIC Annual Conference begins.

Register at www.loma.org/LICCEO



Steve Shaffer



Dave Crenshaw



Nick Shutwell



Kevin Nazemi

Thursday, February 8, 2024 (continued)

11:15 a.m.

Imagine! Facilitated Discussion

Facilitator: Dean Lambert, Executive Director, LIC

Your meeting...your topics! A focus of every LIC meeting is a facilitated discussion featuring your requested topics of opportunities and challenges as leaders of small-to-midsize insurance companies. Here are some of the topics submitted so far:

- Ways that AI is changing the industry – and how to leverage it
- Geopolitical outlook and its impact on the industry
- Staff development & employee engagement
- Remote work structure
- Investments



Dean Lambert

12:00 p.m.

Networking Luncheon

1:00 p.m.

Imagine YOUR COMPANY 2.0:

Harnessing Innovation Ideals for Growth

Carlos Rojas, Founder of 2.0, Innovation and Business Transformation expert

What if your company's innovative ideals could be the driving force behind its transformation and growth? In this dynamic session, we invite you to imagine that future. Carlos Rojas, an expert known for his relentless pursuit of understanding new trends and decoding human behaviors, will guide you on a journey toward "YOUR COMPANY 2.0." His experience spans helping startups to Fortune 500 companies craft business strategies that enhance current reach and profitability while also fostering future growth.

Carlos will provide a glimpse into what the next evolution of your organization could look like by harnessing these ideals. He will share insights on leveraging innovative ideals, emerging trends, and shifts in consumer behavior to drive your organization's transformation.



Carlos Rojas

2:30 p.m.

Facilitated Discussion Part II

Continuation of requested discussion topics.

3:30 p.m.

Sessions Adjourn for the Day

6:00 p.m.

Networking Reception

6:30 p.m.

LIC Annual Membership Banquet

LIC's traditional annual banquet is a chance to enjoy fine dining, develop old and new friendships in the industry, and mark the occasion as the LIC leadership is handed from 2023 LIC Chair Steve Shaffer, CEO of Homesteaders Life Company, to incoming 2024 Chair Tony Mravle, CEO of KSKJ Life.

LIC Community Engagement

Virtual Food Drive for San Diego



The 2024 LIC Annual Conference is supporting the [San Diego Food Bank](#), the largest hunger-relief organization in San Diego County. Last year, the Food Bank distributed 45 million pounds of food, and the Food Bank serves, on average, 400,000 people per month in San Diego County. Click the link below to participate in our Virtual Food Drive!

[LIC2024 Virtual Food Drive](#)

[See Progress Toward LIC's Goal](#) | [#MeetingsThatMatter](#)

Thank You To Our Banquet Sponsors!



Friday, February 9, 2024

8:00 a.m. **Networking Breakfast**

8:30 a.m. **Welcome from LIC's Incoming Board Chair**

Tony Mravle, CEO, KSKJ Life



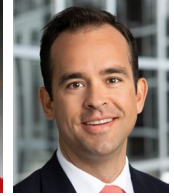
Tony Mravle



Chris Campbell



Kim Shaul



Christopher Belz

8:45 a.m. **Insurance CEO Panel**

Moderator: Tony Mravle, CEO, KSKJ Life

Join us in conversation with a panel of LIC Member CEOs, each of whom brings a unique experience and perspective as a company leader, facing opportunities and challenges we all have in common:

Chris Campbell, CEO of BetterLife, has vast experience working with large FinTech and Financial Services companies with a focus on marketing and technology enablement. He was President-CEO of eFinancial, the nation's second-largest multi-carrier DTC life insurance agency. BetterLife is a member-owned, community-based society that provides life, annuity and accident products. With BetterLife as a new brand identity, Chris has focused on transformation through productive disruption.

Kim Shaul is the interim President-CEO of National Guardian Life Insurance Company and formerly SVP & General Counsel for NGLIC. The organization is a multi-line mutual insurance company offering life and annuity products, LTC, and preneed, among others. Her deep understanding of the regulatory environment, combined with strong leadership skills, has helped her maintain her leadership team's focus on continuing growth, managing the risks of growth, and supporting the deeply held core values that propel her organization forward. Kim has a unique perspective on succession and adapting her core skills to managing the full enterprise.

Christopher Belz is President/CEO of Catholic Life Insurance, a fraternal membership organization that provides life insurance and retirement products. He became CEO in December 2023, after joining the organization in 2022. He is part of a leadership legacy that his predecessor and father, who served as President/CEO for 39 years. Christopher spent 14 years in the investment realm before joining Catholic Life Insurance. His experience as an emerging leader and first-time CEO will provide insights on succession and building organizational trust, while offering a glimpse of what a new generation of insurance company CEOs believe are the opportunities and challenges for the future of life insurance.

9:45 a.m. **Keynote Address**

Demography is Destiny

Profound Strategic Planning for Uncertain Times

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

Ken will provide his latest insights on demography and "the math" that our members have enjoyed through previous LIC engagements!

As the markets and geopolitical conditions rapidly change, his insights are crucial to understanding how America's Baby Boomers, Gen X, Gen Y and other countries' age curves interact to create the rapidly emerging opportunities and challenges of the world we live in today. Speaking to our broader group of life insurance leaders in San Diego, this exciting and informative session will help you understand what the future will bring for people, profits and the planet:

- Culture evolution
- Technology/AI implications
- The labor pool
- Insurance products and services

With this knowledge, IMAGINE how you would approach adapting or creating new strategies for enduring company success!



Ken Gronbach

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

2024 LIC Annual Conference

ATTENDEE LIST PREVIEW

AAM - Pete Wirtala, CFA, Insurance Strategist
 Addition Wealth - Ana Mahony, CEO and Founder
 Agenium - Tim Dineen, Sr VP
 Agenium - Chad Gracey, SVP, Business Development
 American Fraternal Alliance - Allison Koppel, CEO
 American Savings Life - Byron Allen, President & CEO
 American Savings Life - John Shirts, CFO
 American Savings Life - Paul Whetten, EVP/COO
 AQS Asset Mgmt - Stephen Gonzalez, Portfolio Manager
 Atidot - Joel Theodros, Sales
 Atlantic Coast Life - Tom Holland, VP National Accts
 Balanced Growth Consulting - Jason Bordui, Pres/Founder
 Balanced Growth Consulting - Ted Mackenzie, Business Development Executive
 Benekiva - James Preston, Sr. National Account Executive
 Benekiva - Bobbie Shrivastav, Co-Founder and COO
 BetterLife - Chris Campbell, CEO
 Catholic Life Insurance - Christopher Belz, President/CEO
 Catholic Order of Foresters - Greg Temple, Pres. & CEO
 Charlie Financial - Kevin Nazemi, CEO
 Charlie Financial - Nick Shutwell, SVP of Growth & Distr.
 Clearpoint Advisors - Eric Rader, President
 Converge Re - Erin Anders, Head of Business Developmt
 CSA Fraternal Life - John Kielczewski, President / CEO
 Cyrus Life - Chris Meredith, Chief Business Development Officer, Cyrus Works
 Cyrus Life - Bobby Pierce, Exec VP of Sales & Marketing
 The Empathy Project - Woody Wodchis, Regional Director, Business Development
 Emtech Group Inc. - Gary Tyreman, CEO
 Emtech Group Inc. - Rob Secontine, VP of Sales
 Epoq, Inc - Clifford Cohen, Business Development Director
 Equisoft - Michael Zelesnik, VP Insurance Solutions
 First Consulting - Sean Cox, President
 Frankenmuth Insurance - Matt Taylor, VP of Sales, Life
 Friedland Consulting Services - Bruce Friedland, Principal
 Gallagher Re - Andrew Edelsberg, SVP, Senior Broker
 Gallagher Re - Mary Broesch, Executive Vice President
 GBU Financial Life - Lesley Mann, Chief Marketing Officer
 GPM Life - Jay Moyer, VP - Director of Marketing
 Heritage Life - Pete McPherson, FSA, Senior VP
 Heritage Life - Michelle Casaus, AVP of Operations
 Homesteaders Life Company - Steve Shaffer, CEO
 iCover - Jim Sorebo, Chief Distribution Officer
 iCover - Hari Srinivasan, Founder and CEO
 Ignite Partners / Kuvare - Matt Murphy, Head of Bus Devel & Strategy
 iLife Technologies - Jackie Kranenburg, Growth
 iLife Technologies - Nelson Lee, Founder, CEO

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 Jacobson - Jack Walsh, Managing Director
 KGC Direct - Ken Gronbach, President/CEO - Speaker
 KSKJ Life - Tony Mravle, FLMI, President & CEO
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 MIB/PSG - Bill Walasek, Head of Sales
 MIB Group - Brian Millman, Vice President
 Modern Woodmen - Mark Singleton, Chief Strategy Officer
 National Guardian Life - Kim Shaul, JD, Interim CEO
 Navy Mutual - Brian Luther, President & CEO
 Navy Mutual - Lindsay McFarland, Vice President, Member Services
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 Parkway Advisors - TJ Holladay Jr., Investment Consulting Strategist
 Puritan Life - Dierdre Woodruff, Sr. Vice President
 Puritan Life - Meg Duty, Sr Vice President
 Puritan Life - Lindsay Beam
 Puritan Life - Heather Miller, VP - Operations
 QLAdmin Solutions - Greg Garza, Managing Partner & CTO
 QLAdmin Solutions - Kat Correa, Chief Marketing Officer
 RGA - Chris Murumets, SVP, Strategic Growth, Americas
 SCOR - Brittany Lee, Director, Partnerships
 SCOR - Michelle Young, VP, Partnership Development
 Security National Life - Jason Overbaugh, VP
 SILAC - Dan Acker, President & Chief Marketing Officer
 Slovene National Benefit Society - Joe Evanish, National President/CEO
 TAI - Brian Traxler, SVP, Business Development and Client Experience
 Teachers Life - Martha Turner Osborne, Chief Mktg & Innovation Officer
 Teachers Life Insurance Society - Kayte Fredrickson, President & CEO
 thinktum & illustrate - Lyndon Edwards, President
 thinktum & illustrate - Paul Reaburn, CEO

TruStage - Fernand LeBlanc, VP, Strategy and Innovation
 twopoint0 - Carlos Rojas, Speaker
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 USAlliance Life and Security Company - Jack Brier, President
 UTUIA - Ken Laugel, President/ CEO
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