

Ideas for Growing Your Annuity Business



LIC Annuity Committee Meeting

Hosted by Equisoft

1250 Boul. René-Lévesque O, Montréal, QC H3B 4W8, Canada

Meeting Location: Boardroom on Mezzanine Level

March 26-27, 2024

Register at www.loma.org/LICANNUNITY

AGENDA & PRELIMINARY ATTENDEE LIST

Tuesday, March 26, 2024

2:00 pm ET **Welcome and Attendee Introductions/Activity Reports**

What's the most important news in your life today, personally and professionally? Hear what's going on at other companies and get to know your fellow attendees.

2:30 pm ET **Technology Reconnaissance – What Companies Need To Compete & Serve in the Annuity Marketplace**

Brian Carey, Senior Director - Insurance Industry Principal, Equisoft

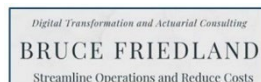
3:00 pm ET **Hot Topics in Annuities: Facilitated Discussion**

Topics will be selected by the meeting participants, with live polling serving as a launching point for group discussion. Requested topics:

- **Rates:** Developments due to changes in interest rate yield curve; rate-setting frequency
- **Products:** Qualified annuities; FIAs; fixed annuities for smaller life companies; finding your niche in indexed annuities; FPDA – contracts issued with only one premium; SPIA – significance in portfolio and outlook
- **Marketing & Distribution:** Large case practices related to large annuities; what wholesalers asking for; IMO issues

Continued

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Tuesday, March 26, 2024, continued

4:00 pm ET **Adjourn for the Day**

6:30 pm ET **Networking Reception/Dinner with Views of Montreal – Hosted by Equisoft, 32nd Floor**

Wednesday, March 27, 2024

8:30 am ET **Continental Breakfast Hosted by Equisoft**

9:00 am ET **Asset Intensive Reinsurance**

Dariush Akhtari, Chief Actuary and Erin Anders, Head of Business Development, Converge Re
We'll explore the benefits of asset-intensive reinsurance (AIR) and through the use of a simple GIC/MYGA, illustrate how IRR, strain, capital amount, and capital ratio can be improved through AIR further increasing cedant's capacity to write more business or offer better crediting rate.

9:30 am ET **Panel: Leveraging the Explosive Growth of Annuity Sales**

Kyle Timmermann, VP of Business Development, Parkway Advisors (Moderator)
Keith Golembiewski, FLMI, FFSI, AAPA, Assistant VP, Annuity Research, LIMRA and LOMA
Roger Aucoin, Senior Research Analyst, LIMRA and LOMA
Chris Conklin, FSA, MAAA, MBA, Co-President/Consulting Actuary, Miller and Newberg
Tom Wurfel, FSA, MAAA, President, Allen Bailey & Associates
Gain insight into LIMRA's U.S. annuity research data, and discuss investment challenges and potential opportunities in annuities, as well as annuity product design.

11:30 am ET **Networking Luncheon Hosted by Equisoft**

Restaurant Jérôme Ferrer – Europea
1065 Rue de la Montagne, Montréal, QC H3G 0B9, Canada

12:30 pm ET **Adjourn**

Preliminary Attendee List (as of 3/8/2024)

Allen Bailey & Associates - Tom Wurfel, President (Remote)
American Savings Life Insurance Company - Michael Frahm, Senior Vice President (Remote)
CL Life - Gary Sorensen, Director, Sales and Marketing (Remote)
Converge RE - Dariush Akhtari, Chief Actuary
Converge Re - Erin Anders, Head of Business Development
CSA Fraternal Life - John Kielczewski, President / CEO
Equisoft - Brian Carey, Senior Director - Insurance Solutions
Equisoft - Michael Zelesnik, Vice President, Insurance Solutions
FCSLA Life - Cynthia Maleski, National President/CEO (Remote)
FCSLA Life - Paul Smithers, National Sales Manager (Remote)
Friedland Consulting Services, LLC - Bruce Friedland, Principal (Remote)

Indiana Farm Bureau Insurance - Mark Meadows, Annuities Manager
iPipeline - Brian Clark, Director, Strategic Accounts
iPipeline - Greg Hurley, Director, Sales
Liberty Bankers Insurance Group - John Blocher, Chief Risk Officer
Liberty Bankers Insurance Group - Michelle Clements, Senior Vice President - Annuity Operations (Remote)
LIC - Dean Lambert, Executive Director
LIC - Audrey Wittenburg, Director of Operations
Lifeshield - David Brooks, President (Remote)
LIMRA and LOMA - Keith Golembiewski, Assistant Vice President, Annuity Research (Remote)
LIMRA and LOMA - Roger Aucoin, Senior Research Analyst (Remote)
Miller & Newberg Consulting Actuaries - Chris Conklin, Co-President / Consulting Actuary
National Security Insurance Company - Tonya Jones, COO and VP of Human Resources (Remote)
Parkway Advisors - Kyle Timmermann, VP of Business Development
thinktum & illustrate - Lyndon Edwards, President
UTUIA - Ken Laugel, President/ CEO