

Strategies for Small-Company Investment and Capital Management



LIC Investment Committee Meeting

Hosted by Catholic Order of Foresters | Naperville, IL | October 16-17, 2024

Meeting Location: Catholic Order of Foresters, 355 Shuman Blvd, Naperville, IL 60563

Recommended Hotel: Chicago Marriott Naperville, 1801 N Naper Blvd, Naperville, IL 60563

AGENDA & EARLYBIRD ATTENDEE LIST

Wednesday, October 16, 2024

2:00 pm CT **Welcome & Attendee Introductions/Activity Reports/Hot Topics**

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 Investment executives.

2:45 pm CT **Finding Buried Treasure**

Barry Jacobson, CFO, Paradigm Partners International
Will Rinehimer, FSA, Consultant, Paradigm Partners International
Capital management strategy and options for using reinsurance from the direct writer's perspective.

3:30 pm CT **Networking Break**

3:45 pm CT **ICOLI: Benefits and Strategies for Smaller Companies**

Eric Rader, President, Clearpoint Advisors
Anthony Smulski, CIMA, Institutional Consulting Director, Graystone Consulting

4:30pm CT **FHLB Chicago**

Roger Platt, Managing Director, Institutional Sales, and Bruce Cox, Director, Client Strategy, Federal Home Loan Bank of Chicago

5:15 pm CT **Overview on Alternative Investing in the Startup Venture Capital Fund**

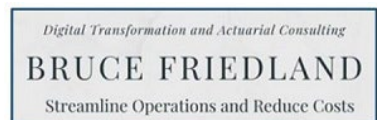
David Gritz, Managing Director, InsurTechNY

5:30 pm CT **Adjourn for the Day**

6:30 pm CT **Hosted Networking Dinner at La Sorella di Francesca**

18 W. Jefferson Avenue Naperville, IL 60540

SPONSORED BY



Thursday, October 17, 2024

8:30 am CT **Continental Breakfast**

9:30 am CT **Surplus Notes**

Andrew Edelsberg, CPA, FLMI, SVP, Head of Business Development - Life Solutions Group, Gallagher Re

10:15 am CT **Networking Break**

10:30 am CT **Morgan Stanley Presentation**

Matt Hornbach, Managing Director & Global Head of Macro Strategy, Morgan Stanley

11:15 am CT **Facilitated Discussion & Networking Luncheon Hosted by Catholic Order of Foresters**

12:30 pm CT **Adjourn**

Strategies for Small-Company Investment and Capital Management



LIC Investment Committee Meeting

Hosted by Catholic Order of Foresters | Naperville, IL | October 16-17, 2024

Register at www.loma.org/LICINV - contact LIC@loma.org if you have any questions.

EARLYBIRD ATTENDEE LIST

As of 10/14/2024

AAM - Jim Law, CFA, Vice President of Business Development and Consultant Relations
ACORE CAPITAL - Andrew Terry, Managing Director
American Fraternal Alliance - Allison Koppel, CAE, CEO
American Savings Life - John Shirts, CPA, CFA charterholder, Chief Financial Officer (Remote)
American Savings Life - Byron Allen, President/CEO
American Savings Life - Paul Whetten, MA, EVP/COO
American Savings Life - Scott Allen, BDO
AQS Asset Management - Larry White, Managing Director, Managing Director
AQS Asset Management - Stephen Gonzalez, CFA, CPA, Portfolio Manager
Catholic Order of Foresters - Chris Nowotarski, FLMI FSLI, General Counsel (Remote)
Catholic Order of Foresters - Benjamin Guzman Jr, FIC, AMLI, Portfolio Manager - Private Placements & Real Estate
Catholic Order of Foresters - Greg Temple, President and Chief Executive Officer
Catholic Order of Foresters - Laura Stanek, FLMI, Portfolio Manager - Structured Products
Catholic Order of Foresters - Taylor Zeck, Junior Investment Analyst
Clearpoint Advisors LLC - Eric Rader, President
Converge Re - Jessica Kaplan, Senior Investment Associate (Remote)
Converge Re - Melissa Roddy, Sr. Advisor (Remote)
CSA Fraternal Life - John Kielczewski, CLU, FLMI, President / CEO
CSA Fraternal Life - Nick Kosmas, Secretary / Treasurer
ELCO Mutual Life and Annuity - Ponni Nainar, CPA, CFO/Treasurer
ELCO Mutual Life and Annuity - Silvio Rodia, EVP/CRO
Federal Home Loan Bank Chicago - Bruce Cox, Analyst
Federal Home Loan Bank Chicago - Roger Platt, Managing Director
Friedland Consulting Services, LLC - Bruce Friedland, MBA, FSA, MAAA, CLU, ChFC, Principal (Remote)
Gallagher Re - Andrew Edelsberg, CPA, FLMI, SVP, Business Development - Life Solutions
Graystone Consulting - Anthony Smulski, CIMA, Institutional Consulting Director
Homesteaders Life Company - Doug Earney, CFA Charterholder, Chief Investment Officer
Homesteaders Life Company - Steve Pick, FLMI, Executive VP-Chief Financial Officer/Treasurer
InsurTech NY - David Gritz, Managing Director
Invesco - Chris Mechem, CFA, Head of Institutional Insurance
KSKJ Life - Brian Sharp, MBA, FLMI, CFO
KSKJ Life - Tony Mravle, FLMI, President & CEO
LIC - Audrey Wittenburg, ALMI, ACS, Director of Operations
LIC - Dean Lambert, Executive Director
Morgan Stanley - Matt Hornbach, Managing Director & Global Head of Macro Strategy
Paradigm Partners International - Barry Jacobson, CFO
Paradigm Partners International - Will Rinehimer, FSA, Consultant
Parkway Advisors - Nick Chapman, Portfolio Manager
Polish Roman Catholic Union Of America - Jim Robaczewski, ALMI, President
United Benefits, Inc. - Charlie Allison, FSA, MAAA, CFA, President
USAlliance Life and Security Company - Jack Brier, President