

# 2024 LIC PRENEED FORUM

# Succeeding in Preneed



## 2024 LIC Preneed Forum

Hosted by Physicians Mutual, 2600 Dodge Street, Omaha, NE 68131

November 6-7, 2024 | Register at: [www.loma.org/preneed](http://www.loma.org/preneed)

## Agenda & Preliminary Attendee List

### Wednesday, November 6, 2024

- 7:45 a.m.      **Registration Opens**
- 8:00 a.m.      **Continental Breakfast Hosted by Physicians Mutual**
- 8:30 a.m.      **Welcome from Physicians Mutual / Introductions**  
Rob Reed, President & CEO, Physicians Mutual  
Dean Lambert, Executive Director, LIC
- 9:15 a.m.      **Panel: Customer Experience/Voice of the Customer(s)**  
Jeff Dahms, PhD, Director of Customer Experience and Insights, Physicians Mutual  
Judy Olson, Vice President, Sales and Business Development, National Guardian Life  
Melissa Kaisershot, Director of Customer Service, Physicians Mutual  
Ray Adamson, Chief Customer Officer, Lavvi  
*A moderated panel discussion to explore the unique and varied customer types in the preneed space, challenges and successes of creating best-in-class experiences for each. Concepts to be explored include sales enablement, customer-centered product design, customer journeys, and customer service.*
- 10:15 a.m.     **Networking Break**
- 10:30 a.m.     **LIC Preneed Survey Update & Discussion**  
Dean Lambert, Executive Director, LIC  
Pam Kleese, FLMI, Director, Research and Insights, Homesteaders Life Company  
Andrea Rouleau, FSA, MAAA, SVP and Chief Actuary, National Guardian Life Insurance Company  
*Discuss insights from the latest LIC Preneed Survey and provide input for future research.*
- 11:30 a.m.     **Networking Luncheon Hosted by Physicians Mutual**

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## Wednesday, November 6, 2026, continued

- 12:30 p.m.     **Understanding Consumer Psychology and Uncovering Hidden Consumer Preferences using the Zaltman Metaphoric Elicitation Technique**  
James Forr, Head of Insights, Olson Zaltman  
*James Forr is an expert on understanding what makes people tick and how their psychology affects their behavior. In addition to leading ground-breaking in-depth research into perceptions of the funeral industry a decade ago, James has consulted for Fortune 500 companies including Amazon, PepsiCo, Pfizer, P&G, and CVS Health. He also has lectured at universities around the country, including the Wharton School, Georgetown University,, and Boston University.*
- 1:45 p.m.     **Networking Break**
- 2:00 p.m.     **Preneed Market Update**  
Steve Shaffer, President and CEO, Homesteaders Life Company  
*What's happening in the preneed industry and what the future looks like.*
- 3:00 p.m.     **Hot Topics in Preneed – Facilitated Discussion**  
*The number-one value cited by LIC conference attendees is the ability to participate in open discussions with peers. Topics will be determined in advance by registrants...your meeting, your topics!*
- 4:00 p.m.     **Adjourn for the Day**
- 6:00 p.m.     **Reception & Dinner hosted by Physicians Mutual**

## Thursday, November 7, 2024

- 8:00 a.m.     **Continental Breakfast Hosted by Physicians Mutual**
- 8:30 a.m.     **NFDA Consumer Research**  
Gail Marquardt, Vice President-Consumer Engagement, National Funeral Directors Association  
*Review of NFDA annual consumer research.*
- 9:15 a.m.     **Process & Tech Innovation**  
Samir Ahmed, Principal and Senior Architect, X by 2  
*A discussion about new ways to approach process and technology innovation that results in more rapid implementations and ROI.*
- 10:00 a.m.    **Networking Break**
- 10:15 a.m.    **Preneed Forum Closing Discussion**  
Pam Kleese, FLMI, Director, Research and Insights, Homesteaders Life Company  
Andrea Rouleau, FSA, MAAA, SVP and Chief Actuary, National Guardian Life Insurance Company  
Steve Shaffer, President and CEO, Homesteaders Life Company  
Gail Marquardt, Vice President-Consumer Engagement, National Funeral Directors Association  
Samir Ahmed, Principal and Senior Architect, X by 2  
*Panel discussion with speakers to explore unanswered questions or additional thoughts about the meeting topics.*
- 11:00 a.m.    **Adjourn**

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### Preliminary Attendee List (October 25, 2024)

Agenium - Tim Dineen, Sr VP  
Atlantic Coast Life - Charles Sanders, President  
Atlantic Coast Life - Rachel Moring, US Life Liaison  
Benekiva - Tony Diodato, Chief Revenue Officer  
Converge Re - Erin Anders, FLMI, Head of Business Development  
ELCO Mutual - Fred Wilmsen, RHU, ChHC, Vice President of Business Development  
ELCO Mutual Life and Annuity - Bill Bruce, ALMI, Vice President of Operations  
Epoq - Clifford Cohen, Business Development Director  
Equisoft - Michael Zelesnik, Vice President, Insurance Solutions  
Family Liberty Life - Fred Meisenheimer, Chief Operations Officer  
Global Atlantic - Nicholas Pucci, AVP, Preneed Product Actuary  
Heritage Life - Pete McPherson, FSA, Senior Vice President  
Homesteaders Life Company - Pam Kleese, FLMI, Director, Research & Insights  
Homesteaders Life Company - Steve Shaffer, FLMI, CPA, CEO  
Homesteaders Life Company - Tom Holland II, Ph.D., CPC, Vice President  
Homesteaders Life Company - Scott Morris, VP Business Development  
iPipeline - Christian Cooper, Director, Sales  
iPipeline - Andy Stengel, Account Executive, Sales  
Lavvi - Miguel Ceron, ALMI, ACS, ARA, Account Executive  
Lavvi - Ray Adamson, Chief Customer Officer  
LIC - Dean Lambert, Executive Director  
LIC - Audrey Wittenburg, Director of Operations  
LIMRA and LOMA - Chris Atkins, FLMI, ACS, ARA, AIRC, Member Solutions Director  
National Guardian Life - Andrea Rouleau, FSA, MAAA, SVP and Chief Actuary  
National Guardian Life - Judy Olson, Vice President, Sales and Business Development  
NFDA - Gail Marquardt, VP, Consumer Engagement  
Olson Zaltman - James Forr, Head of Insights  
Parkway Advisors - Kyle Timmermann, VP of Business Development  
Pekin Life Ins. Co. - John Campbell, FLMI, ACS, CLU, AIRC, RHU, ARA, AVP of Preneed Sales  
Physicians Mutual - Bill Sloane, ASA, MAAA, Pricing Actuary  
Physicians Mutual - Emmett Nelson, Director  
Physicians Mutual - Leigh Klemencic, Director - Preneed  
Physicians Mutual - Melissa Kaisershot, Director, Customer Service  
Physicians Mutual - Tim Reed, FLMI, VP, Sales  
Physicians Mutual - Patrick Glenwright, Corporate Development Manager  
Physicians Mutual - Mike Carstens, FSA, MAAA, Vice President, Product Management  
Physicians Mutual - Buffy Vaughn, Preneed Account Manager  
Texas Service Life Insurance Company - George Wise, FSA, Executive Vice President  
United Benefits - Eduardo Salido, Chief Marketing Officer  
Wellabe - Hollie Zeglen, New Business Supervisor  
Wellabe - Jenn Sopcich, Product Manager  
Wellabe - JoAnne Turner, Director of New Business  
Wellabe | Western Insurance Company - Al Whitmer, Director National Sales Distribution  
X by 2 - Samir Ahmed, Principal and Senior Architect