



CEO Networking: Shared Challenges, Practical Solutions

2024 LIC Winter CEO Forum

The Westgate Hotel, San Diego | February 6-7, 2024 | Register at www.loma.org/LICCEO



Supporting the San Diego
Food Bank (See next page)

AGENDA & ATTENDEE LIST

Tuesday, February 6, 2024

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

8:30 a.m. **LIC CEO Forum Attendee Introductions & Activity Reports**

Kick off this important networking event with a round-robin introducing each participant and hearing the key initiatives and challenges they are facing this year.

10:30 a.m. **Networking Break**

11:00 a.m. **Investment Strategies & Economic Outlook**

Mark McDonnell, Senior Portfolio Manager and Jan Erik Warneryd, Chief Investment Officer, Optimum Quantvest Corporation

In 2023 the markets became quite favorable compared to the historically painful 2022 discussed at last year's LIC Annual Conference in Jupiter, FL. As many asset classes improved, what are leading indicators telling us for 2024 and beyond? What possible strategy approaches should insurance company leaders consider in the face of continued financial and geopolitical uncertainty?

12:00 p.m. **Networking Luncheon**

1:00 p.m. **Facilitated Discussion**

The LIC CEO Forum offers a unique opportunity to discuss your biggest challenges with other small-to-midsize life insurance company CEOs. Topics will be selected by participants, including:

- Life Insurance Trends
- Leveraging AI Tools
- Employee Engagement
- Managing Remote/Hybrid Workers
- Legislative/Regulatory Outlook for Smaller Carriers
- Distribution Challenges & Opportunities
- Quality Assurance
- Asset Allocation

2:00 p.m. **Adjourn for the Day**

3-8:30 p.m. **Naval Base Tour & Networking Dinner with the LIC Board**

(Registered Spouses Included)

Join us for an outing to Naval Air Station North Island, where we'll tour [Fleet Logistics Multi-Mission Squadron \(VRM\) 30](#), the U. S.

Navy's first CMV-22B Osprey squadron. The "Titans" of VRM-30 were established to begin the Navy's transition from the C-2A Greyhound, which has provided logistics support to aircraft carriers for four decades, to the CMV-22B, a tiltrotor V/STOL aircraft that can take off and land as a helicopter but transit as a turboprop aircraft. Bus transportation will leave from the hotel lobby at 3:00 pm, and will take us from the tour to dinner at [Il Fornaio Coronado](#) and back to the hotel.



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[Wednesday, February 7, 2024](#)

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

8:30 a.m. **Life Industry Themes and Trends**

John Carroll, Senior VP and Head of Insurance and Annuities - U.S. & Canada, LIMRA and LOMA

9:30 a.m. **Networking Break**

9:45 a.m. **Facilitated Discussion (continued)**

11:00 a.m. **CEO Forum Adjourns**

12-5 p.m. [For LIC Board Members Only: LIC Advisory Board Meeting](#)

6-7 p.m. [For LIC Annual Conference Registrants: Kick-Off Reception](#) - see www.loma.org/LIC2023



LIC Community Engagement

San Diego Food Bank: Virtual Food Drive

LIC strives to leave a positive impact on the local communities where our conferences are held. For the 2024 LIC Annual Conference & CEO Forum, we are supporting [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. For more information and to contribute, please visit our [Virtual Food Drive](#).

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



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PRELIMINARY LIST OF REGISTRANTS

1891 Financial Life - Lisa Bickus, CEO
American Fraternal Alliance - Allison Koppel, CEO
American Savings Life - Byron Allen, President & CEO
BetterLife - Chris Campbell, CEO
Catholic Life Insurance - Christopher Belz, President/CEO
Catholic Order of Foresters - Greg Temple, President/CEO
Columbian Mutual Life - Mike Fosbury, President & CEO
CSA Fraternal Life - John Kielczewski, President / CEO
Cyrus Life Insurance Company - Chris Meredith, Chief Business Development Officer, Cyrus Works
GPM Life - Peter Hennessey IV, President
Heritage Life Insurance Co. - Pete McPherson, Senior VP
Homesteaders Life Company - Steve Shaffer, CEO
KSKJ Life - Tony Mravle, President & CEO
Liberty Bankers - Brad Phillips, Chief Executive Officer
Modern Woodmen - Mark Singleton, Chief Strategy Officer
National Guardian Life - Kim Shaul, Interim CEO
Navy Mutual - Brian Luther, President & CEO
Optimum Quantvest Corporation - Mark McDonnell, Senior Portfolio Manager (Presenter)
Optimum Quantvest - Jan Erik Warneryd, Chief Investment Officer (Presenter)
Optimum Quantvest Corporation (OQC) - Jean-Martin Aussant, Senior Vice-President (Presenter)
Puritan Life - Dierdre Woodruff, Sr. Vice President
SILAC - Dan Acker, President & Chief Marketing Officer
Slovene National Benefit Society - Joe Evanish, National President
SWBC Life - Joan Cleveland, President & CEO
Teachers Life - Kayte Fredrickson, President & CEO
Texas Service Life - Susan Thomas, Owner and CEO
TruStage - Fernand LeBlanc, VP, Strategy and Innovation
United Benefits, Inc. - Charlie Allison, President
USAlliance Life and Security Company - Jack Brier, President
UTUIA - Ken Laugel, President/ CEO