

LIC CEO FORUM

CEO Networking: Shared
Challenges, Practical Solutions

2025 Summer LIC CEO Forum

Fairmont Sonoma Mission Inn & Spa | Sonoma, CA | August 26-28, 2025 | www.loma.org/LICCEO

Agenda & Earlybird Attendee List

Tuesday, August 26, 2025

8-11:30 am **LIC Board Meeting with Continental Breakfast** (Current/Past LIC Board Members Only)

4:30-9:00 pm **Winery Outing & Dinner** (CEO Forum Attendees, Registered Spouses/Guests Included)

Meet at the hotel for bus transportation at 4:30 p.m. to Benziger Family Winery, where we'll enjoy a tour and wine tasting reception followed by dinner in an underground wine cave.

Sponsored by LIC Past Chair Susan Thomas

Wednesday, August 27, 2025

8:00 am **Networking Hot Breakfast**

8:30 am **Welcome & Attendee Introductions**

10:30 am **Networking Break**

11:00 am **Insights on Executive/Senior Leader
Succession Strategies for Small to Medium
Life Insurance Companies**

Steven R. Lang, President, Lang Consulting, LLC

This is a two-part session. The morning segment will discuss succession concepts and the importance of developing young talent for long-term succession planning, offer actionable steps and a template for succession planning and development.

An experienced life insurance company leader, Steve Lang began his career in human resources and used this background and experience to influence his own career and leadership journey. He is former Chairman and CEO of Homesteaders Life Company, and as President of Lang Consulting he provides succession planning programs, executive coaching services, and CEO support.

12:00 pm **Networking Luncheon**

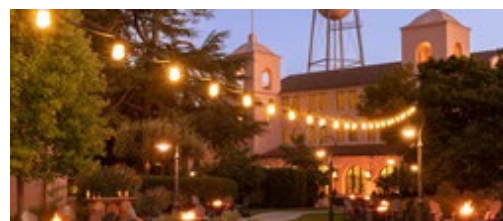
1:00 pm **CEO Panel: Leadership Succession Experiences**

This segment of our exploration of succession planning will be a panel discussion with LIC members in various stages of succession, with the goal of gaining insights from their real-life experiences.

2:00 pm **Networking Break**

Thank You To Our CEO Forum Sponsors!

LIC Past Board Chair Susan Thomas



[Fairmont Sonoma: Hotel Reservation Link](#)



The 2025 Summer LIC CEO Forum is partnering with [Fire Safe Sonoma](#), a 501(c)(3) organization dedicated to fire prevention and fire safety in Sonoma County. Please help LIC leave a lasting impact from our meeting in Sonoma! [Donate here](#), and mention LIC in the special instructions field.
#MeetingsThatMatter

- 2:30 pm **CEO Roundtable**
 Discussion topics requested by participants include Annuity Distribution and Growth, Reinsurance Strategies, Talent Management/Compensation, Regulatory Issues, Executive Succession Planning - Sourcing Talent and Creating an Effective Development and Retention Plan, Hiring a Deputy or COO, Pros and Cons of Outsourcing Admin Functions, Hybrid Distribution Models, D2C Lessons Learned, Field Force Modernization and ROI on Digital Tools, Leveraging Technology, Employee Growth/Recruiting, and Product Management.
- 3:00 pm **Adjourn for the Day**
- 6:30 pm **Networking Dinner**

Thursday, August 28, 2025

- 8:00 am **Networking Hot Breakfast**
- 8:30 am **Strategies for Leveraging AI for LIC Companies — Enabling Sustained Success**
Kartik Sakthivel, Ph.D., VP & Chief Information Officer, LIMRA and LOMA
 In addition to his role at LIMRA and LOMA, Kartik is an industry thought leader who champions the use of technology to improve the revenue, profitability, and efficiency of the organization. He brings insights from LIMRA's industry AI Governance Group, which draws expertise from 72+ business and technology executives representing 40+ US insurance companies.
- 10:00 am **CEO Roundtable: Closing Discussions**
 You set the agenda for discussion with CEO peers on the topics most relevant to you. We'll wrap up with additional discussion on requested topics ranging from Artificial Intelligence to Economic Volatility/Investment Forecast to Recruiting and Succession Planning.
- 11:30 am **Adjourn**

Earlybird Attendee List (July 7, 2025)

American Journey Financial Life - Ken Laugel, President/ CEO
 American Savings Life - Byron Allen, President/CEO
 BetterLife - Chris Campbell, CEO
 Catholic Order of Foresters - Greg Temple, President and CEO
 Converge Re - Craig Buck, CEO
 CSA Fraternal Life - John Kielczewski, President / CEO
 ELCO Mutual Life and Annuity - Silvio Rodia, EVP/CRO
 GBU Life - Lesley Mann, EVP, Chief Marketing & Distribution Officer
 GPM Life - Peter Hennessey IV, President & CEO
 Heritage Life - Pete McPherson, Senior Vice President
 Homesteaders Life - Steve Shaffer, CEO
 KSKJ Life - Tony Mravle, President & CEO
 Lang Consulting, LLC - Steve Lang, President
 LIC - Audrey Wittenburg, Director of Operations
 LIC - Dean Lambert, Executive Director
 LIMRA and LOMA - Dave Levenson, President and CEO
 LIMRA and LOMA - Kartik Sakthivel, Vice President and Chief Information Officer
 LIMRA and LOMA - Sean Grindall, SVP, Insurance & Annuities
 Navy Mutual - Brian Luther, President & CEO



Optimum Re - Francois Duguay, EVP & Chief Actuary

Puritan Life - Dierdre Woodruff, Sr. Vice President

Slovene National Benefit Society - Joe Evanish, CEO

SWBC Life Insurance Company - Joan Cleveland, President & Chief Executive Officer

Trans World Assurance - Rusty Branch, Vice President/Director

TruStage - Fernand LeBlanc, President, Preplanning Solutions

United Benefits, Inc. - Charlie Allison, President

United Heritage Life Insurance Company - Todd Gill, President & CEO

USAlliance Life and Security Company - Jack Brier, President

WAEPA - Shane Canfield, CEO