LIC Operations Committee Meeting

Hosted by Security National Life Insurance | Salt Lake City | September 24-25, 2025

Meeting Location: Security National, 433 Ascension Way, Suite 600, Salt Lake City, UT 84123
Recommended Hotel: Hilton Salt Lake City Center, 255 S W Temple St, Salt Lake City, UT 84101

Security National
— *Family of Life Companies* —
SNL · ALIC · FGI

AGENDA

Wednesday, September 24, 2025

Optional Event:

11:30 am **LIC ERM Committee Networking Lunch**
Operations attendees arriving early are welcome to head over to Security National Life to join us for lunch! Learn more about the ERM Meeting at www.loma.org/LICERM.

2:00 pm **Operations Committee Meeting Begins:**
Welcome Remarks, Attendee Introductions/Activity Reports
Jon Meredith, Director of Policy Administration, Security National Life
Dean Lambert, Executive Director, LIC

Learn what's going on at the other companies represented at the meeting — including key initiatives, current challenges, and latest news — to facilitate networking with your Operations peers.

Carpools/rideshares to Security National Life will meet in Hilton lobby at 1:30 pm.

2:45 pm **Networking Break**

3:00 pm **Operations Case Study: Security National Life**
This case study will focus on operational KPIs and efficiencies. Our host company will discuss their process of creating KPIs in Operations, how they use them, and the focus this has created on constantly improving the efficiency of their teams.

3:45 pm **Networking Break**

4:00 pm **Obitdata: An Untapped Business Intelligence Source**
John Heald, Chief Growth Officer-Legacy.com

Obitdata is a product of Legacy.com, the largest and most complete online obituary resource in North America. Obitdata's compiled data is used by companies for environmental scans ahead of strategy planning, forecast opportunities and challenges presented by population shifts, and staying ahead of compliance demands related to unclaimed property. Mr. Heald heads Legacy.com's growth programs such as ObitData, MarketIQ and Genealogy partnerships, among others.

THANK YOU TO OUR MEETING SPONSORS

PARKWAY ADVISORS

AMERICAN FRATERNAL ALLIANCE

IPIPELINE

QLAdmin SOLUTIONS

equisoft

Emtech Group, Inc

Media Sponsor:

insurtech express

5:00 pm   **Adjourn for the Day**
           Carpools/rideshares to the Hilton.

6:30 pm   **Hosted Networking Dinner – Downtown Salt Lake City**

Thursday, September 25, 2025

8:00 am   **Continental Breakfast Hosted by Security National Life**
           Carpools/rideshares will meet in Hilton lobby at 7:30 am.

8:30 am   **Planning, Managing, Implementing, Reviewing A Tech Platform Implementation**
           Jes Vargas, Director of Solutions, Benekiva
           Angela Daleske, AAPA, ACS, ASRI, FSRI, Director-Claims, Homesteaders Life Company

           Benekiva's results and their client companies' demand for rapid ROI depend on careful scoping of needs, project planning and management. This presentation and discussion will highlight elements of a successful project plan and one company's implementation experience including a project review.

           Jes leads initiatives that streamline internal processes, operationalize go-to-market strategies, and enhance the implementation of claims processing solutions. Known for her ability to bridge technical complexity with real-world insurance operations, she has developed tools and methodologies that elevate how insurers evolve their claims processes.

9:45 am   **Networking Break**

10:00 am **Emtech Case Study: Catholic Life Insurance**
           Sashia Godet, Vice President Product Development-Emtech Group, Inc.
           Roxy Huron, AVP Information Technology-Catholic Life

           Emtech Group's Sashia Godet will present with Roxy Huron of Catholic Life Insurance, a case study focusing on the use of technology to improve QA processes which provide several operational benefits such as increased efficiency in product development, faster time to market and easier adoption rates for agents and consumers.

11:00 am **Networking Break**

11:15 am **Facilitated Discussion: Operations Q&A**
           Moderated by LIC

           This is a time to discuss additional questions on topics covered during the meeting as well as submitted by attendees through their registration.

11:30 am **Networking Luncheon Hosted by Security National Life**

12:30 pm **Adjourn**