

2026 LIC ANNUAL CONFERENCE

Going to Market

Omni Tucson National Resort | February 4-6, 2026



Small-to-midsize life insurers are seeing exciting new opportunities in the midst of technological advances, new consumer expectations and needs, and new ways of doing business. The LIC Annual Conference is the place to network, learn, and share ideas with peers at similar companies... to help inspire and shape strategies for success in 2026 and beyond. The theme of the 2026 LIC Annual Conference is **Going to Market**. Focus areas will include new product development to reach underserved consumers, AI applications, distribution insights, finding and retaining top talent, and the latest life and annuity market data and forecasts. Join us at the LIC Annual Conference and make 2026 your best year ever!

AGENDA

Wednesday, February 4, 2026

6:00 p.m. **Opening Reception & Registration**

7:00 p.m. **Dinner On Your Own**

Thursday, February 5, 2026

7:30 a.m. **Networking Breakfast & Registration**

8:30 a.m. **Welcoming Remarks and Introduction to the 2026 LIC Annual Conference**
LIC Board Chair Joan Cleveland, CEO, SWBC Life; Dean Lambert, Executive



Joan Cleveland
SWBC Life



Dean Lambert
LIC
Director, LIC

9:00 a.m. **Keynote Address**

Unfair Comparisons: Nuancing the "Sold Not Bought" Mentality

Maria Ferrante-Schepis, Founder, ThinkWorthy Consulting



Maria Ferrante-Schepis
ThinkWorthy Consulting

Maria Ferrante-Schepis is a published author, consultant and established thought leader for insurance and finance professionals and executives. Her Amazon bestselling book, *Flirting with the Uninterested: Innovating in a "Sold Not Bought" Category*, co-authored with Mike Maddock, explored challenges and opportunities in the insurance industry. Her second book, *Unfair Comparisons: Nuancing the "Sold Not Bought" Category*, continues this insightful journey, exposing subtle and not so subtle nuances that will help the industry make further progress.

10:00 a.m. **Q&A with Maria Ferrante-Schepis**

Facilitator: Matt Clifford, CEO and Principal, Matt B. Clifford Consulting

Matt Clifford is an insurance veteran who helps mid-market insurers align senior leaders on the few bets that matter, match growth opportunities to real capabilities, and install execution plans that stick. His involvement has resulted in helping companies move faster, cut execution waste, and free up operating expense to fund their plans. He will lead audience discussion and Q&A on insights from Maria Ferrante-Schepis's presentation



Matt Clifford
Matt B. Clifford Consulting

Thursday, February 5, 2026, continued

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

11:00 a.m. **Going to Market with Consumer Added Value**

Angel Paravicini, Vice President, Business Development, Empathy

Angel Paravicini is a seasoned business development leader with over 15 years of experience driving growth, strategic partnerships, and go-to-market innovation across the insurance, financial services, and health-tech sectors. As Vice President of Business Development at Empathy, Angel leads carrier and financial institution partnerships that help organizations support families through loss while unlocking new engagement, retention, and revenue opportunities. She is passionate about creating meaningful experiences for families, strengthening organizational value propositions, and helping institutions deepen trust with the people they serve..



Angel Paravicini
Empathy

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

1:00 p.m. **Going to Market with the Best People**

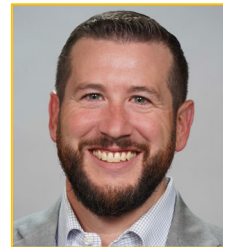
Chris Meredith, Chief Operations Officer, Cyrus Works, Cyrus Life Insurance Co.

Jack Walsh, Managing Director, The Jacobson Group

A practical discussion around talent seeking for smaller companies with limited resources, including recruiting/evaluating, training, motivating, and retaining top talent.



Chris Meredith
Cyrus Life



Jack Walsh
The Jacobson Group

2:00 p.m. **Networking Break**

2:30 p.m. **Going to Market with the Best Partners: Vendor Due Diligence**

Buckley (Invited)

Successfully going to market requires effective management of your distribution relationships, including due diligence in selecting vendors, maintaining solid agency partnerships, and evaluating new channels. Gain insights from the agency viewpoint in this presentation, and make sure you're going to market with the best vendors/partners.

3:30 p.m. **Sessions Adjourn for the Day**

5:30 p.m. **Special Feature: Headshot Photography**

Get your professional photo updated! LIC will have a photographer on hand before and during the pre-banquet reception.

6:00 p.m. **Networking Reception**

6:30 p.m. **LIC Annual Banquet**

LIC's traditional Annual Banquet is a chance to enjoy fine dining, develop old and new friendships in the industry, and mark the occasion as the LIC leadership is handed off to the new incoming board for 2026. All LIC Annual Conference attendees come together at the banquet for more great networking plus a celebration of LIC's membership, mission, and importance in the insurance industry.

Friday, February 6, 2026

7:30 a.m. **Networking Breakfast**

8:00 a.m. **Welcome from LIC's Incoming Board Chair for 2026**

Dierdre Woodruff, Senior Vice President, Puritan Life Insurance Company of America



Dierdre Woodruff
Puritan Life

8:05 a.m. **Going to Market Case Study**

Marketing and Making Good on the Excellent Experience Promise

Paul Mlodzik, Member Relations Director (Canada), LIMRA and LOMA

Paul Mlodzik supports insurance and financial services leaders to drive growth, profitability, and customer engagement, based on 25+ years of leadership and executive experience specializing in marketing, brand/channel management, communications, customer experience and digital transformation. Gain insights and join in a discussion on how smaller companies can make good on the customer expectation of an excellent experience.



Paul Mlodzik
LIMRA and LOMA

9:00 a.m. **Break**

9:30 a.m. **Going to Market With Confidence: Consumer Insight is Key**

Karen Malone, FCLA, WCLA, Senior Director, TransUnion

We've all heard "knowing your customer" is important to engaging and building customer loyalty, but too often we get stuck on seeking relationships with customers that approximate the policy owners we currently have. This strategy can lead to missed opportunities with emerging prospects. With the right data, insurance companies can understand likely behaviors, needs, and outcomes based on analyzing current behaviors. Learn how this data can help you find your best customers, reach them, and serve them what they want in the way they want it.



Karen Malone
TransUnion

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

11:00 a.m. **Case Study: Value Adds that Hit the Spot**

Jennifer Stockdale, AVP Marketing and Community Engagement, GBU Life

Clifford Cohen, Business Development Director, Epoq

Learn about GBU Life's experience incorporating value-added member benefit services with Epoq/LawAssure.



Jennifer Stockdale
GBU Life



Clifford Cohen
Epoq

12:00 p.m. **Adjourn**