

LIC INVESTMENT AND CAPITAL MANAGEMENT COMMITTEE

Shared Insights and Strategies for Capital Management in Small to Midsize Insurance Companies



LIC Investment & Capital Management Forum

Hosted by Catholic Life Insurance | San Antonio, TX | September 23-24, 2026

PRELIMINARY AGENDA

Subject to Change

Wednesday, September 23, 2026

- 12:00 p.m. **Optional Luncheon for Insurance Company Attendees (by invitation)**
- 2:00 p.m. **Welcome & Attendee Introductions/Company News**
Christopher Belz, President/CEO, Catholic Life Insurance
Audrey Wittenburg, FLMI, ACS, Director of Operations, LIC LIMRA and LOMA
- 2:45 p.m. **Economic Review**
Wellington Management (Invited)
An update on the economic environment with a focus on factors affecting life insurance company investment strategies.
- 3:45 p.m. **Networking Break**
- 4:00 p.m. **Change Management in the Investment World**
- 5:00 p.m. **Adjourn for the Day**
- 6:30 p.m. **Hosted Networking Dinner at Casa Rio on the Riverwalk**
Opened in 1946, Casa Rio is the oldest restaurant on the River Walk and was modeled after the very first true Tex-Mex restaurant in the country.

Thursday, September 24, 2026

- 8:30 a.m. **Continental Breakfast Hosted by Catholic Life**
- 9:00 a.m. **Update from FHLB Dallas**
Noah Richard, Federal Home Loan Bank of Dallas (Invited)
- 10:00 a.m. **AI and Transformative Concepts for Small to Midsize Life Insurance CIOs and Portfolio Managers**
- 11:00 a.m. **Facilitated Discussion**
- 11:30 a.m. **Networking Luncheon Hosted by Catholic Life**
- 12:30 p.m. **Adjourn**

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