

Strategies for Innovation at Smaller Companies



LIC Techology Committee Conference Call
Via Webex | April 7, 2021, 2-3:30 p.m. ET | www.loma.org/LICTECH
Access Info
See your confirmation email for this meeting's Webex registration link.

AGENDA & ADVANCE ATTENDEE LIST

Antitrust Policy
www.loma.org/antitrust

2:00 p.m. **Welcome**

2:15 p.m. **Project Management Process in Executing Innovation Strategy**

Nick Gerhart, EVP – Chief Innovation Officer, Homesteaders Life
Strategy and innovation are important, but without effective execution and project management all you have is an idea. Learn about Homesteaders' process, and bring your questions.

3:00 p.m. **Hot Topics in Technology:
Facilitated Discussion with Live Polling**

Jeff Shaw, CLU, ChFC, Executive Director, LIC
Find out what other companies are experiencing and actions they're taking with regard to the COVID-19 pandemic and initiatives/priorities for 2021. Topics will be pre-selected by participants, such as:

- How far out are IT initiatives planned?
- Tracking IT spending
- centrally or by department?
- Top cyber-related initiatives
- Top digitization-related initiatives
- Subscription or perpetual licensing models for core systems
- Size of IT staff relative to Home Office employees and revenue

3:30 p.m. **Adjourn**

After the Meeting

Meeting handouts, including slides, polling results, recordings, and the final Attendee List, will be posted in the LIC Technology Committee Online Community at www.loma.org/LICConnect. Nonmember attendees will have 7 days' complimentary guest access to download the files and check out this member resource. We encourage you to continue the Q&A with your peers there!

Check In Early! The meeting room will open at 1:30 pm EDT so you can check your mic and join in pre-meeting conversation. If you need assistance, contact Audrey Wittenburg via text at (703) 975-5626.

THANK YOU SPONSORS!



Preliminary Attendee List (as of 4/6/21)

American Savings Life Insurance Co.: James Gilbert, Director of IT
BetterLife: Wayne Boddicker, Director, Programming
Catholic Financial Life: Jeff Piotrowski, FMLI, Chief Operating Officer
Catholic Life Insurance: Scott Brant, FLMI, ACS, AAPS, AIAA, AIRC, ARA, Senior Vice President, IT
Catholic Order of Foresters: Joni Kazmierczak, VP of Business Analysis and IT
Cincom Systems: Angie Ingram, Senior Account Executive
Columbian Financial Group: Greg Sim, FLMI, CIO
CSA Fraternal Life: Nick Kosmas, IT Director
Delta Life Insurance Company: Larry Keen, FLMI, ACS, AIAA, Information Technology Manager
ELCO Mutual Life and Annuity: Roger Grum, VP
ELCO Mutual Life and Annuity: Shelly Grisar, ALMI, ACS, Project Coordinator
GCU: Bill Schulok, Chief Life Underwriter
GCU: Marilyn Dyrwal, Producer Services & New Business Manager
GCU: Scott Schuetz, Chief Operating Officer, EVP
Gleaner Life Insurance Society: Arell Chapman, CRISC, FLMI, Senior Vice President, Chief Operations & Technical Officer
Gleaner Life Insurance Society: Judy Lawrence, FLMI, ACS, Assistant Vice President - IT Development and Processing
Gleaner Life Insurance Society: Michelle Zimmanck, FLMI, AAPA, ACS, OCSA, OCWA, BPMs, IT Supervisor
Gleaner Life Insurance Society: Nikki Carson, MA, FLMI, ACS, AIAA, CSA, AIRC, ARA, Senior Systems Analyst
GPM Life Insurance: Gregory Lawler, CDR/USN (Ret.), MBA, FLMI, CIO
GPM Life Insurance: Jeff Shaver, Marketing Technologist Manager
Homesteaders Life Company: Claire Struthers, PMP, Project Manager
Homesteaders Life Company: Nick Gerhart, EVP-Chief Innovation Officer
illustrate inc: Eric Swanson, VP of Sales
Individual Assurance Company: Callie Broughton, Project Manager
iPipeline: Chris Nichols, EVP, Research & Development
iPipeline: Jeremy Bourland, Director Sales
KSKJ Life: Tony Mravle, FLMI, PHR, CEO
Liberty Bankers Insurance Group: Dave Kessler, ALMI, Sr. VP of Technology
LIC: Audrey Wittenburg, ALMI, ACS, Associate Director
LIC: Jeff Shaw, CLU, ChFC, Executive Director
Management Research Services, Inc.: Matt Whitton, Director of Product
Management Research Services, Inc.: Tim Dineen, Chief Executive Officer
Management Research Services: Josh Dixon, Product Owner
Patriot Life Insurance: Marty Dinehart, FLMI, Executive Vice President and COO
Polish Falcons of America: Tim Kuzma, President and CEO
Pulse Logic: Ken Cochrane, Managing Director
Puritan Life Insurance Company of America: Megan Duty, MSIM, PMP, Vice President
QLAdmin Solutions: Greg Garza, CTO & Director of Software Development
QLAdmin Solutions: Kat Correa, MBA, FLMI, Chief Marketing Officer
ReMark: Steve Gaertner, SVP, Distribution Strategies
SBLI: Rose Conneely, Chief Operating Officer
Security National Life Ins.: Jason Overbaugh, VP
Senior Life: Marcia Reis, PMP, Project Manager
SPJST: Roy Vajdak, CPA, Attorney, Controller
Texas Service Life Ins. Co.: Casey Hughes, Chief Operating Officer
Texas Service Life Insurance Company: Susan Thomas, I, CEO
Texas Service Life: Chris Canada, CIO
The Baltimore Life Companies: Kim Ashby, ACS, AVP Business Analysis and Quality Assurance
thinktum inc: Jenn McLean, AVP Operations
thinktum inc: Tom Murphy, AVP, Technology Delivery
Trilogy Actuarial Solutions: Douglas Brown, ASA, MAAA, Founding Partner
Trilogy Actuarial Solutions: Joshua Gerdes, ASA, MAAA, Founding Partner
United Home Life/Indiana Farm Bureau Insurance: Melinda Grubb, Manager
United Systems and Software, Inc.: Troy Schake, CSL, Senior VP Business Development