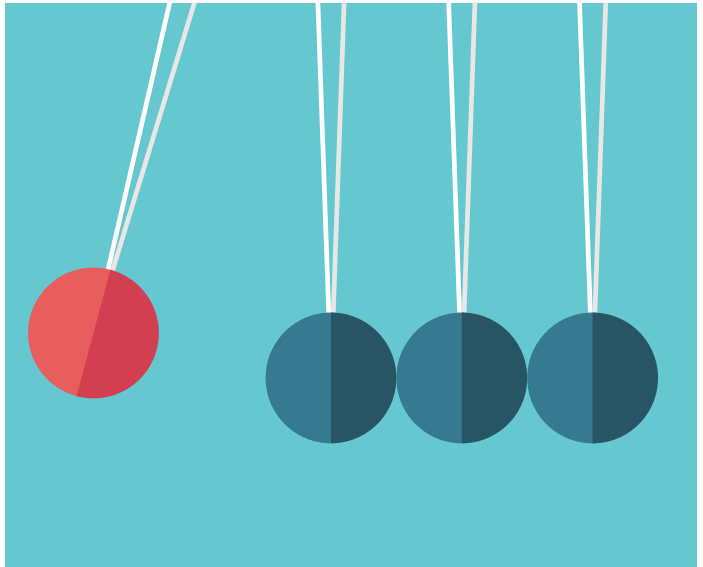


# 2018 Financial Informum

May 21–23, 2018

The New Orleans Marriott  
New Orleans, LA



*The New Imperative of Transformation*

## Onsite Program



# 2018 Financial Inforum

May 21–23, 2018 • The New Orleans Marriott  
New Orleans, LA

## MONDAY, MAY 21

### REGISTRATION

1:00 - 5:30 P.M.

*Riverview Prefunction*

### GENERAL SESSION

#### Market Signals: What Are the Financial Markets Telling Us Now?

3:00 - 4:00 P.M.

*Riverview II*

*Peter Ricchiuti, Director of Research for Burkenroad Reports, A.B. Freeman School of Business, Tulane University*

### NETWORKING REFRESHMENT BREAK

4:00 – 4:15 P.M.

*Sponsored by State Street*

*Riverview Prefunction*

### GENERAL SESSION

#### Technology & Innovation: Opportunities for Our Industry

4:15 – 5:15 P.M.

*Riverview II*

*Moiz Kohari, Senior Vice President & Chief Technology Architect, State Street*

*Paul Fahey, Head of Insurance Solutions, Northern Trust*

## OPENING RECEPTION

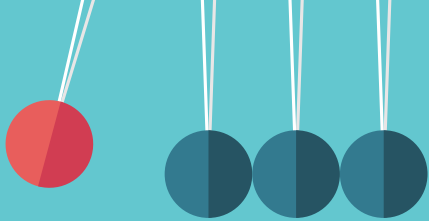
5:30 – 7:00 P.M.

*St. Charles*

*Sponsored by Citi*

*Open to all registered conference attendees and registered conference guests.*





## TUESDAY, MAY 22

### CONTINENTAL BREAKFAST

7:00 – 8:00 A.M.

*Riverview Prefunction  
and Riverview I*

### WELCOME AND KEYNOTE

#### When UBERIZATION Collides With Your Industry

*Tom Morrison, Author, Speaker, Association CEO, Life Coach*

8:00 – 9:45 A.M.

*Riverview II*

### NETWORKING REFRESHMENT BREAK

*Sponsored by Castle Peak Associates*

9:45 – 10:00 A.M.

*Riverview Prefunction*

### GENERAL SESSION

#### State of the Industry: Executive/CFO Perspective

*Jeffrey L. Hasty, FLMI, ACS, Senior Vice President,  
LOMA (Moderator)*

*Mark Kaye, Chief Financial Officer, MassMutual US*

*Margaret Meister, President and CEO, Symetra Financial*

*Michael Sparrow, Vice President and CFO,*

*Individual Annuity Products & Services, Nationwide Insurance*

10:00 – 11:00 A.M.

*Riverview II*

### NETWORKING REFRESHMENT BREAK

*Sponsored by Castle Peak Associates*

11:00 – 11:15 A.M.

*Riverview Prefunction*

### GENERAL SESSION

#### Robotics Process Automation – Today and Tomorrow!

*Goran Micanovic, Investments and Financial Management  
Technology Director, Northwestern Mutual*

*Sarah Schaus, Assistant Treasurer and AVP,*

*Allianz Life Insurance Company of America*

11:15 A.M. – 12:15 P.M.

*Riverview II*

### LUNCH BUFFET

*Sponsored by KeyBanc Capital Markets*

12:15 – 1:00 P.M.

*Riverview Prefunction  
and Riverview I*

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## CONCURRENT SESSIONS (Pick one)

1:00 – 2:00 P.M.

### 1.1 Hot Topics in Treasury

*St. Charles*

*Kathy Hoffman, Vice President & Assistant Treasurer,  
Prudential Financial*

*Karen Molloy, Vice President & Treasurer,  
Northwestern Mutual*

### 1.2 ETFs as Tools for Your Portfolio Strategy

*Napoleon*

*Eric W. Solfisburg, CFA, Insurance ETF Specialists,  
State Street Global Advisors SPDR*

*Joel LePard, Head of Global Portfolio Strategy, Liberty Mutual Investments*

### 1.3 Applying Digital/Intelligent Innovation: With a Focus On Impact!

*Riverview II*

*Don McNeas, Partner, Head of Life, Annuity, Health  
and Retirement Benchmarking & Advisory, Aon Ward Group*

*Tim Arthur, AVP, Digital Finance, Lincoln Financial Group*

## NETWORKING REFRESHMENT BREAK

2:00 – 2:15 P.M.

*Sponsored by MUFG*

*Riverview Prefunction*

## CONCURRENT SESSIONS (Pick one)

2:15 – 3:15 P.M.

### 2.1 Payments Modernization: Enhancing the Client Experience

*St. Charles*

*Carl Slabicki CTP, AAP, Director,  
Product Management – Immediate Payments,  
BNY Mellon Treasury Services*

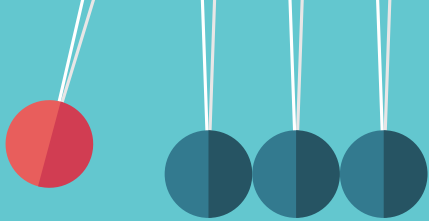
*Teresa Cordes, CPA, Senior Treasury Consultant, Treasury Services,  
Lincoln Financial Group*

### 2.2 Hot Topics in Investments

*Napoleon*

*Chris Spurrell, Principal, Castle Peak Associates*

*Timothy L. Carlson, Controller, Midland National® Life Insurance Company*



### 2.3 Data: Building the Foundation for Success

*Riverview II*

*Patrick J. Smyth, Managing Director,  
FS Finance Transformation, PwC (Moderator)*

*Brad Housour, Director, FS Finance Technology and Operations, PwC*

*Brad Hunkler, Senior Vice President and Chief Financial Officer,  
Western & Southern Financial Group*

### NETWORKING REFRESHMENT BREAK

**3:15 – 3:30 P.M.**

*Sponsored by MUFG*

*Riverview Prefunction*

### GENERAL SESSION

**3:30 – 4:30 P.M.**

#### Finance Transformation: MassMutual's Journey

*Riverview II*

*Mark Kaye, Chief Financial Officer, MassMutual US*

*Todd Picken, Treasurer, MassMutual*

### NETWORKING DINNER

**7:00 – 9:00 P.M.**

*Sponsored by BNY Mellon and Northern Trust*

*Pool Deck*

*Open to all registered conference attendees  
and registered conference guests.*

## WEDNESDAY, MAY 23

### CONTINENTAL BREAKFAST

**7:00 – 8:00 A.M.**

*Riverview Prefunction  
and Riverview I*

### GENERAL SESSION

**8:00 – 9:00 A.M.**

#### Fraud: Increasing Threats to Your Company and Policyholders

*Riverview II*

*Jim Fox, Senior Vice President, Wells Fargo*

*Ann Kirst, Assistant Director, Treasury Operations, Northwestern Mutual*

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## REFRESHMENT BREAK

9:00 – 9:15 A.M.

*Riverview Prefunction*

## CONCURRENT SESSIONS (Pick one)

9:15 – 10:15 A.M.

### 3.1 Collateral Management: The Evolution from Operations to Front Office

*Riverview II*

*Michael O'Loughlin, Managing Director, BNYMellon Markets*

*Rohit Agarwal, Principal Market Specialist, Calypso Technology*

### 3.2 Insurance Accounting Update

*St. Charles*

*Robert Johnson, Partner, Financial Services Office,  
Ernst & Young LLP*

## REFRESHMENT BREAK

10:15 – 10:30 A.M.

*Riverview Prefunction*

## GENERAL SESSION

10:30 – 11:30 A.M.

### Navigating Today's Evolving Workplace: Engaging the Human Element

*Riverview II*

*Kylee Lacson, MBA, FLMI, ASRI, ACS,*

*Assistant Vice President and Practice Lead – Life,  
The Jacobson Group*

## CONFERENCE ADJOURNS

11:30 A.M.



## THANK YOU TO OUR SPONSORS

<p><i>Onsite Program</i></p> 	<p><i>Conference Lanyards</i></p> 	<p><i>Tuesday Evening Dinner</i></p> 
<p><i>Conference WiFi</i></p> 	<p><i>Tuesday Morning Refreshment Breaks</i></p> 	<p><i>Monday Evening Reception</i></p> 
<p><i>Conference Bags</i></p> 	<p><i>Tuesday Buffet Lunch</i></p> 	<p><i>Tuesday Afternoon Refreshment Breaks</i></p> 
<p><i>Tuesday Evening Dinner</i></p> 	<p><i>Wall Street Journals</i></p> 	<p><i>Monday Refreshment Break</i></p> 
	<p><i>Conference Banner Sign</i></p> 	



Insurance asset managers are challenged with remaining competitive in a fast-paced digital economy, while needing to increase profitability and respond to regulatory pressures. Improving data management, outsourcing strategically, and modernizing technology are just a few of the ways you could address impediments to success.

**Accenture draws on our end-to-end transformation capabilities to help firms navigate complexity, volatility and cost pressures while creating sustainable competitive advantage.**

For more information, contact:

**CHRISTINA BENOIT**

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