Distribution Conference for Financial Services

Opportunities Ahead

2017

March 1 – 3

Ft. Lauderdale Harbor Beach Marriott Resort & Spa, Ft. Lauderdale, FL

PROGRAM

LIMRA

2017 Distribution Conference for Financial Services

Opportunities Ahead

DISTRIBUTION OF WORKSHOPS

Please use this as a reference to select one workshop from each time period.

	THURSDAY, March 2 10:30 to 11:30 a.m.	THURSDAY, March 2 1:00 to 2:00 p.m.	THURSDAY, March 2 2:15 to 3:15 p.m.	FRIDAY, March 3 8:00 to 9:00 a.m.
Agency-Building	3. Creating and Sustaining a Culture of Achievement *(Salon V)*	8. Leadership Development: A Competitive Advantage *(Salon V)*	13. Practice versus Business: Give Your Field the Winning Edge *(Salon V)*	18. Advisors 2.0 — Practices Powered by Technology *(Salon I/II/III)*
MLEA	4. Changing History One Life at a Time *(Salon I/II/III)*	9. Teaming Grows Up! Moving From Experiment to Core Business Strategy **(FMR WORKSHOP)** *(Salon I/II/III)*	14. The Rapid Evolution of the Advisor/Agent *(Salon I/II/III)*	18. Advisors 2.0 — Practices Powered by Technology *(Salon I/II/III)*
Independent Producer	5. Manage From the Playbook Not the Scoreboard *(Salon IV)*	10. Opportunities for Success in the Affluent Millennial Market *(Salon IV)*	15. Finding and Understanding Untapped Distribution *(Salon IV)*	19. Succession Planning — A Marathon Not a Sprint *(Salon IV)*
Brokerage	6. The Role of Reinsurance: From Anecdote to Fact *(Salon VI)*	11. The Changing Face of America *(VII/VIII)*	16. Wholesaling Insurance Into Institutions: Past, Present, or Future? *(Salon VI)*	20. Tackling Technology: Making It Work for Distribution *(Salon V)*
Direct-to-Consumer	7. In Line for Online: The Market for Internet Sales *(Salon VII/VIII)*	12. Online Options: Different Paths to Success *(VI)*	17. Casting a Wider Net: Attracting New Customers and Monetizing In-Force *(Salon VII/VIII)*	21. Prepping Your Contact Center to Stay Within the DOLines CANCELLED

PROGRAM

◀ WEDNESDAY, MARCH 1 ▶

VALUE-ADDED WORKSHOPS — *4:00 to 5:00 p.m.*

Caribbean Ballroom, Salon V

1. Your Competition Is Not Who You Think It Is

SARAH SCHMIDT, Director, Product Management, Assessment and Development Solutions, LIMRA

Caribbean Ballroom, Salon IV

2. Beyond Digital: Competing in a Connected World

BETSY HUBBARD, Founder, COO & President, Mindset Digital

WOMEN LEADERS' RECEPTION — *5:00 to 5:45 p.m.*

Miami, 2nd Floor

Explore and exchange questions, ideas, and solutions with other women executives in the industry.

For LIMRA members only.

HOSPITALITY RECEPTION — *5:00 to 6:00 p.m.*

Lobby Bar

Sponsored by IMN

Members and carriers only.

LIMRA WELCOME RECEPTION — *6:00 to 7:00 p.m.*

Ocean View Terrace

◀ THURSDAY, MARCH 2 ▶

CONTINENTAL BREAKFAST — *7:15 to 8:00 a.m.*

Grand Ballroom F, 3rd Floor

GENERAL SESSIONS — *8:00 to 10:00 a.m.*

Grand Ballroom B/C, 3rd Floor

Explore the Opportunities Ahead

JAMES W. KERLEY, LLIF
Chief Membership Officer
LIMRA, LOMA, and LL Global

Industry's Challenges and Opportunities Ahead

BRIAN WINIKOFF
Senior Executive Director
Head of AXA's US Life, Retirement and Wealth Management Businesses
AXA Equitable Life Insurance Company

Fiscal Debates: Economic Analysis of an Uncertain Future

TODD BUCHHOLZ
Former White House Director of Economic Policy and CNBC Regular

REFRESHMENT BREAK — *10:00 to 10:30 a.m.*
Grand Ballroom F, 3rd Floor

CONCURRENT WORKSHOPS — *10:30 to 11:30 a.m.*

Caribbean Ballroom, Salon V

3. Creating and Sustaining a Culture of Achievement (AB)

PAMELA BLALOCK, Senior Vice President, Career Distribution, National Life Financial Advisors; **WILLIAM PIENIAS,** Senior Vice President, Foresters Financial Services; *Moderator:* **STEVE REEVES, LUTCF, LLIF,** Vice President of Sales, Western & Southern Financial Group

Caribbean Ballroom, Salon I/II/III

4. Changing History One Life at a Time (MLEA)

LUCAS WEY, Regional Associate Manager, Farm Bureau Insurance Company of Michigan; **KRISTEL WOMBLES,** Manager, Agency Services, State Farm; **KRISTI ZIMMERMAN,** Manager Field Sales Recruiting, COUNTRY Financial; *Moderator:* **VICTOR J. VERCHEREAU, LUTCF, LLIF,** Vice President, Marketing, Farm Bureau Insurance Company of Michigan

Caribbean Ballroom, Salon IV

5. Manage From the Playbook Not the Scoreboard (IP)

MICHAEL COX, Sale Vice President, Midland National; **TODD REIMERS, CLU, LLIF,** Senior Vice President, Chief Sales and Marketing Officer, Assurity Life Insurance Company; **ANTHONY VOSSENBERG,** Consultant; *Moderator:* **JERRY BLAIR, LLIF, ChFC,** Vice President, Chief Distribution and Sales Officer, Midland National

Caribbean Ballroom, Salon VI

6. The Role of Reinsurance: From Anecdote to Fact (BR)

SUSAN GHALILI, Vice President & Chief Underwriter, John Hancock; **WILLIAM MOORE,** Vice President, Underwriting & Medical, Munich Re; **DAVID WHEELER,** Executive Vice President, Head of U.S. Mortality Markets, RGA; *Moderator:* **GARTH GARLOCK,** Senior Vice President, Chief Distribution Officer, North American Company

Caribbean Ballroom, Salon VII/VIII

7. In Line for Online: The Market for Internet Sales (DC)

JENNIFER DOUGLAS, Research Director, Developmental Research, LIMRA; **PATRICK LEARY, LLIF,** Corporate Vice President, Distribution Research, LIMRA

LUNCHEON — *11:30 a.m. to 1:00 p.m.*

Grand Ballroom F, 3rd Floor

CONCURRENT WORKSHOPS — *1:00 to 2:00 p.m.*

Caribbean Ballroom, Salon V

8. Leadership Development: A Competitive Advantage (AB)

MATT MCDOWELL, Director of Targeted Office Support, Northwestern Mutual; **NIKKI SORUM, MBA,** Divisional Vice President, Thrivent Financial; *Moderator:* **JESSICA MADIGAN, CLU,** Director, Leadership Development, Securian Financial Group

FINANCIAL MANAGEMENT RESEARCH WORKSHOP

Caribbean Ballroom, Salon I/II/III

9. Teaming Grows Up! Moving From Experiment to Core Business Strategy (MLEA/FMR)

SHARON KELLY, Vice President, Field Programs & Recognition, Prudential; **JOE O'CONNOR, FSA, MAAA,** Assistant Vice President, Massachusetts Mutual Life Insurance Company; *Moderator:* **ELENA OCHIAN,** Director, Field Compensation, Thrivent

Caribbean Ballroom, Salon IV

10. Opportunities for Success in the Affluent Millennial Market (IP)

DAVID FINE, Director Customer Experience Strategy, Pacific Life Insurance Company; **DARIA LEE SHARMAN,** Assistant Vice President Strategy and Applied Analytics, Pacific Life Insurance Company; *Moderator:* **GREG REBER,** Vice President, Independent Producer Network, Pacific Life Insurance Company

Caribbean Ballroom, Salon VII/VIII

11. The Changing Face of America (BR)

TARIQ KHAN, CEO, Global Diversity Marketing; **VINCE VITIELLO,** President, Global Diversity Marketing; *Moderator:* **NICHOLAS B. JASA,** Vice President, Individual Sales, Assurity Life

Caribbean Ballroom, Salon VI

12. Online Options: Different Paths to Success (DC)

JEFF HACKETT, Vice President, Online Sales & Marketing, Protective Life Insurance Company; *Moderator:* **LAUREN MCCALLUM,** Client Relations Manager, LIMRA

REFRESHMENT BREAK — *2:00 to 2:15 p.m.*

Beverages in Caribbean Foyer

CONCURRENT WORKSHOPS — *2:15 to 3:15 p.m.*

Caribbean Ballroom, Salon V

13. Practice versus Business: Give Your Field the Winning Edge (AB)

ROBERT CLEMENTS, J.D., SCEC, Co-founder, Co-owner, Marketing Director, Benchmark Business Group, LLC; *Moderator:* **SHELLY MEIGHAN, CLU, MBA,** Assistant Vice President, Principal Advisor Network

Caribbean Ballroom, Salon I/II/III

14. The Rapid Evolution of the Advisor/Agent (MLEA)

ELLEN KUGEL, Director, New Agent Development, MetLife; **SETH REDIGER,** Sales District Leader, American Family; *Moderator:* **ROB QUESNEL,** Director, Talent Development, American Family

Caribbean Ballroom, Salon IV

15. Finding and Understanding Untapped Distribution (IP)

RICH BRUGGER, Vice President, National Accounts, Prudential; **CARLO MULVENNA, CLU,** Vice President, Domestic Group Business, Pan-American US Group; *Moderator:* **LUKE COSME,** Senior Vice President, Chief Sales and Marketing Officer, Mutual Trust Life Insurance Company

Caribbean Ballroom, Salon VI

16. Wholesaling Insurance Into Institutions: Past, Present, or Future? (BR)

DAVID BRAUN, Senior Vice President, Institutional Distribution, Highland Capital Brokerage; **CLARK SMITH,** Senior Vice President, Head of Insurance and Annuity Sales, Sun Trust Private Wealth Management; *Moderator:* **JOHN KNOWLES,** Vice President, Senior Account Director, Lincoln Financial

Caribbean Ballroom, Salon VII/VIII

17. Casting a Wider Net: Attracting New Customers and Monetizing In-Force (DC)

JAMES GALLI, EVP, Business Strategy & Innovation, Legal & General America; **GLENN ROTHENBERG,** Head of Marketing, Farmers Life Insurance; *Moderator:* **STEVE GAERTNER,** SVP, Distribution Strategies, ReMark USA

REFRESHMENT BREAK — *3:15 to 3:45 p.m.*

Grand Ballroom F, 3rd Floor

GENERAL SESSION — *3:45 to 4:45 p.m.*

Grand Ballroom B/C, 3rd Floor

FLIP: Proven Strategies for Turning Challenge Into Opportunity and Change Into Competitive Advantage

PETER SHEAHAN

Business Trends Expert; Best-Selling Author;
Founder and CEO
Karrikins Group

HOSPITALITY RECEPTION — *5:00 to 7:00 p.m.*

Lobby Bar

Sponsored by IMN

◀ FRIDAY, MARCH 3 ▶

CONTINENTAL BREAKFAST — *7:00 to 8:00 a.m.*

Grand Ballroom F, 3rd Floor

CONCURRENT WORKSHOPS — *8:00 to 9:00 a.m.*

Caribbean Ballroom, Salon I/II/III

18. Advisors 2.0 — Practices Powered by Technology (AB/MLEA)

FIONA CUDDY, Assistant Vice President, Distribution Operations Support, Great West Life; **FANETTE SINGER,** Senior Vice President Marketing, Country Financial; *Moderator:* **ROBERT "ROB" POPAZZI, CLU, CHS, BA,** Assistant Vice President, Sales Force Growth and Development, Sun Life Financial Distributors

Caribbean Ballroom, Salon IV

19. Succession Planning — A Marathon Not a Sprint (IP)

LAURA MURACH, ACS, FLMI, Associate Research Director, LIMRA; **JAMES WONG,** President, Partners Advantage Insurance Services; Moderator: **BECKY CUMMINGS, MBA, CIC, LUTCF, LLIF, CPIW,** National Sales Manager, US Life & Annuities, Foresters Financial

Caribbean Ballroom, Salon V

20. Tackling Technology: Making It Work for Distribution (BR)

CHAD FERRELL, Senior Vice President, Marketing, American National Insurance; **PAUL KLIMEK,** CEO, Apptical Corp.; **GEORGE "CHIP" VAN DUESEN, IV,** President, Diversified Brokerage Services, Inc.; *Moderator:* **DAVID SHERIDAN,** Vice President, Managing Director, Brokerage, Protective

REFRESHMENT BREAK AND EXHIBITOR PRIZE DRAWING — *9:00 to 9:30 a.m.*

Grand Ballroom F, 3rd Floor

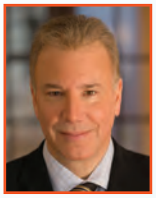
GENERAL SESSIONS — *9:30 to 11:15 a.m.*

Grand Ballroom B/C, 3rd Floor

Riding the Experience Business Wave: How to Harness the Power of Digital to Improve Customer Experiences

CHRISTOPHER YOUNG
Director of Industry Strategy for Financial Services
Adobe

DOL: The Silver Lining



DAVID MACCHIA
Founder and CEO
Wealth2k

Antitrust Policy and Caution

Each person attending this function must be mindful of the constraints imposed by federal and state antitrust laws. The people here today represent companies that are in direct business competition with one another. LIMRA's purpose is to provide a forum for the free exchange of ideas on the designated topics of our meetings. It is not the purpose of these meetings to reach any agreement that could have anticompetitive effects.

Individuals must keep in mind that a violation of the antitrust laws may subject them to substantial fines and a jail term. You can avoid problems by following simple guidelines:

- Stick to the published agenda.
- Pricing, premiums, benefits to be offered or terminated are competitively sensitive information which competitors should not exchange or discuss with each other. Never take a poll of views or make a collective agreement on these issues.
- Always retain your right to make an independent judgment on behalf of your company.

LIMRA is dedicated to the purpose of assisting all of its members to achieve their competitive potential.

Smoking is prohibited during all conference functions.

2018 DISTRIBUTION CONFERENCE FOR FINANCIAL SERVICES

February 28 – March 2, 2018
Sawgrass Marriott, Ponte Verdra, FL

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