



**2023 LIMRA
ANNUAL
CONFERENCE**

Forging the Future

**Leading the Way: Helping Our
Members Navigate With
Confidence**

INDUSTRY CHANGE

TALENT
SHORTAGES

M&A

LEGACY
SYSTEMS

SUPPLY/DEMAND

INDUSTRY CHANGE

DEMOGRAPHICS

GLOBALIZATION

CONSUMER
EXPECTATIONS

FINANCIAL
MARKETS

DIGITAL
PROCESSES

FUTURE OF WORK

ARTIFICIAL
INTELLIGENCE

TALENT
SHORTAGES

M&A

LEGACY
SYSTEMS

SUPPLY/DEMAND

REGULATORY
CHANGES

INDUSTRY CHANGE

INTEREST
RATES

DEMOGRAPHICS

GLOBALIZATION

CONSUMER
EXPECTATIONS

FINANCIAL
MARKETS

DIGITAL
PROCESSES

INFLATION

PRIVATE EQUITY

An Association Powered by Our Members



An Association Powered by Our Members



LIMRA **LOMA**
Navigate With Confidence

An Association Powered by Our Members



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Ameriprise
Financial

Edward Jones

Fidelity

J.P.Morgan

LPL Financial

MERRILL
A BANK OF AMERICA COMPANY

Morgan Stanley

RAYMOND JAMES

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hannover re

Munich RE

RGA

SCOR

Swiss Re

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FINEOS

NTD DATA



SS&C

Verisk™

vitech

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MAXIMIZE

Your Membership

Our Purpose

**Advancing the financial services industry
by empowering our members with**

Knowledge



Insights



Connections



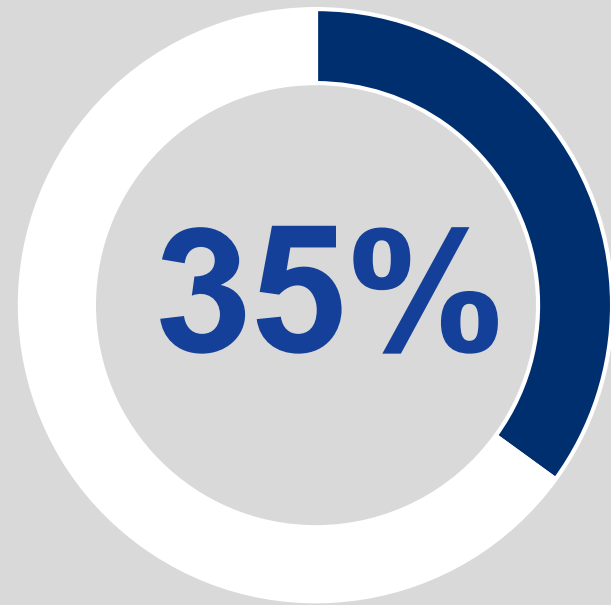
Solutions





KNOWLEDGE

Industry Talent Challenges



Current employees
hired since
March 2020



Knowledge: How We Advance the Industry



Complete Insurance Fundamentals



Industry Advantage



Insurance Immersion



Designations



Strategic Leadership Experience

Knowledge: How We Advance the Industry



Complete Insurance Fundamentals



Industry Advantage



Insurance Immersion



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**Complete Insurance
Fundamentals**



Industry Advantage



Insurance Immersion



Designations



**Strategic Leadership
Experience**

Knowledge: How We Advance the Industry



**Complete Insurance
Fundamentals**



Industry Advantage



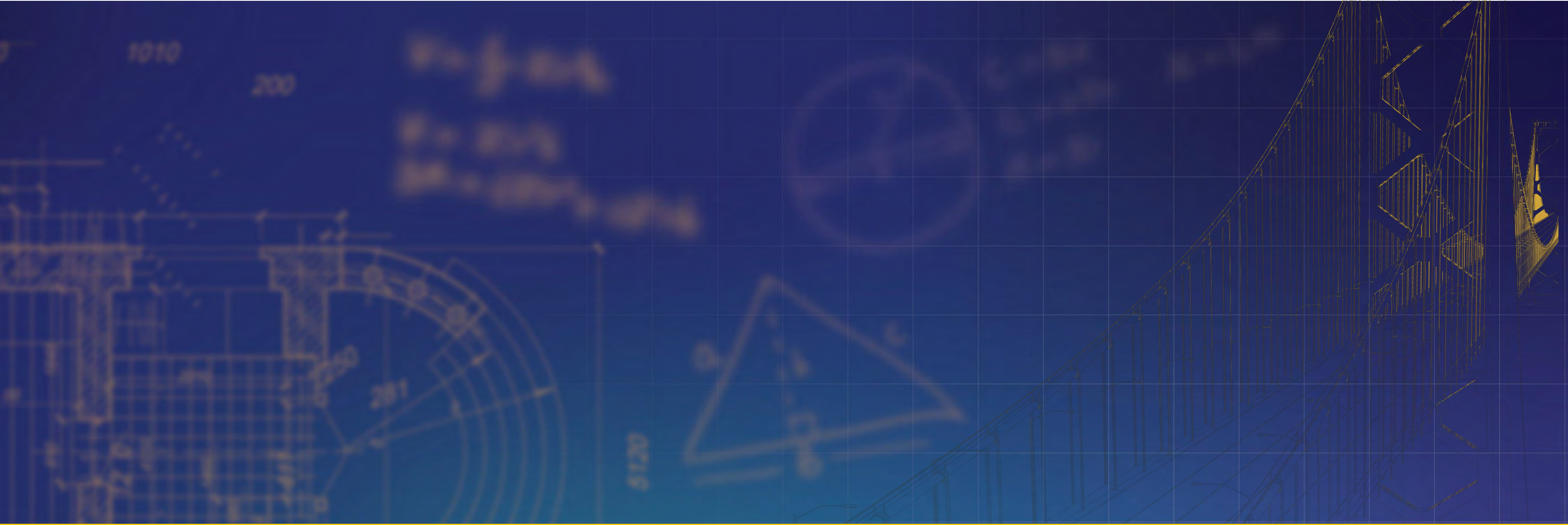
Insurance Immersion



Designations



**Strategic Leadership
Experience**



INSIGHTS

Industry Data & Insights From a Trusted Source

70+

**Number of
benchmark studies
we conduct across
life insurance,
annuity, and
workplace benefits**



Insights: How We Advance the Industry



Compass Program



Product Benchmarks & Research



Consumer Benchmarks & Research



Distribution Benchmarks & Research



Experience Studies Pro



Thought Leadership



McKinsey LIMRA 360 Performance Benchmarking Survey

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Compass Program



Product Benchmarks & Research



Consumer Benchmarks & Research



Distribution Benchmarks & Research



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Thought Leadership



McKinsey LIMRA 360 Performance Benchmarking Survey

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Compass Program



Product Benchmarks & Research



Consumer Benchmarks & Research



Distribution Benchmarks & Research

SOA Research + LIMRA
INSTITUTE *Navigate With Confidence*

Experience Studies Pro

Thought Leadership

ACLI Finseca LIDMA Life Happens LIMRA LOMA MDRT NAIFA NAILBA

McKinsey LIMRA 360 Performance Benchmarking Survey

Insights: How We Advance the Industry



Compass Program



Product Benchmarks & Research



Consumer Benchmarks & Research



Distribution Benchmarks & Research



Experience Studies Pro



Thought Leadership



McKinsey LIMRA 360 Performance Benchmarking Survey



CONNECTIONS

Industry Connections and Networking

10,000+

Number of industry professionals we bring together every year



Connections: How We Advance the Industry



Conferences



Executive Advisory Boards



CXO Groups



Study Groups



Webinars



Canadian Executive Forum



Committees

Connections: How We Advance the Industry



Conferences



Executive Advisory Boards



CXO Groups



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Conferences



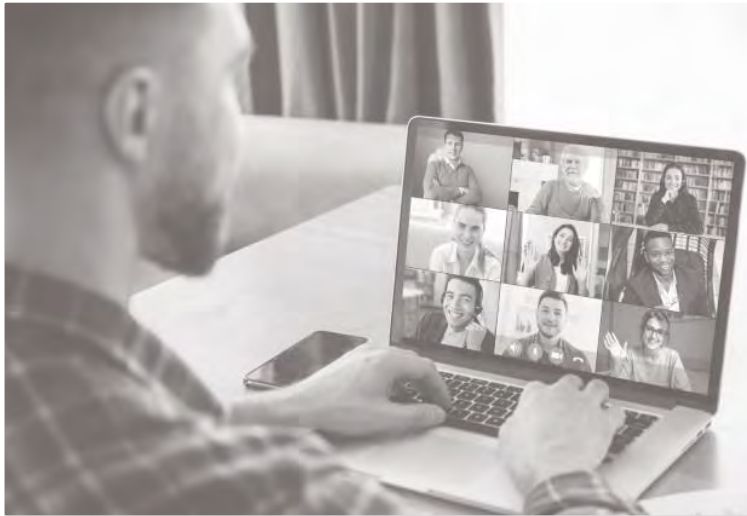
Executive Advisory Boards



CXO Groups



Study Groups



Webinars



Canadian Executive Forum



Committees



SOLUTIONS

Industry Challenges Require Collaborative Solutions

4

Average number of industry solutions utilized by each member



Solutions: How We Advance the Industry



FraudShare



Hiring Assessments



Anti-Money Laundering Training



Compensation Resource Center



LDEX Standards



Trustworthy Selling



Customer Assurance Program



Applied Research Solutions

Solutions: How We Advance the Industry



FraudShare



Hiring Assessments



Anti-Money Laundering Training



Compensation Resource Center



LDEX Standards



Trustworthy Selling



Customer Assurance Program



Applied Research Solutions

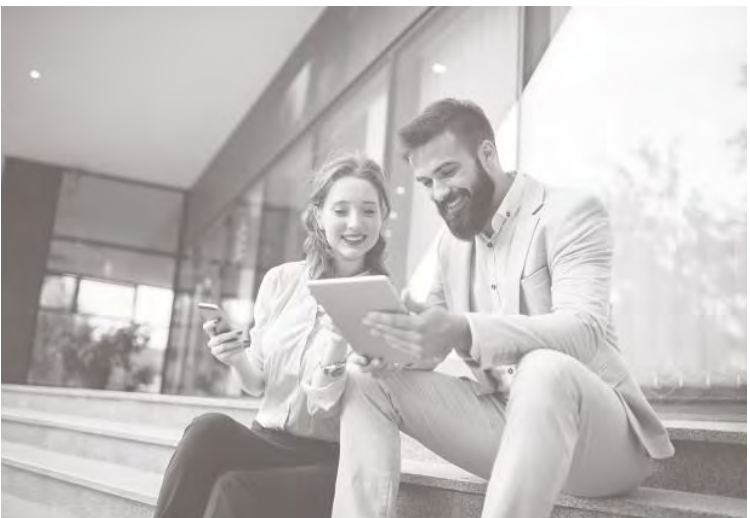
Solutions: How We Advance the Industry



FraudShare



Hiring Assessments



**Anti-Money Laundering
Training**



**Compensation Resource
Center**



LDEX Standards



Trustworthy Selling



**Customer Assurance
Program**



Applied Research Solutions

Solutions: How We Advance the Industry



FraudShare



Hiring Assessments



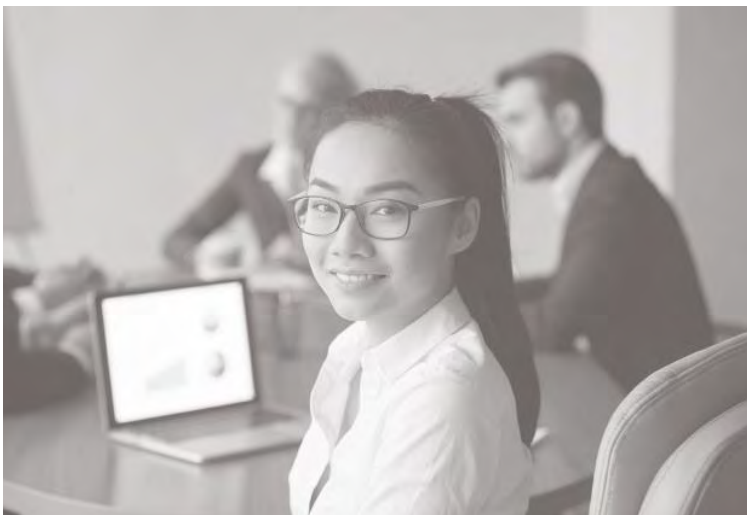
**Anti-Money Laundering
Training**



**Compensation Resource
Center**



LDEx Standards



Trustworthy Selling



**Customer Assurance
Program**



Applied Research Solutions

MAXIMIZE

Your Membership

FORGE THE FUTURE

Together

Thank You



Navigate With Confidence