



Committee and Study Group Engagements

Run Date: August 6, 2024

Prudential (Ultimate Parent)

LIMRA Member Since - October 1, 1932

ACCOUNT TEAM

Chris Callahan

Member Relations Director

ccallahan@limra.com

Al Palmeri

Member Solutions Director

apalmeri@loma.org

Angelina Weeks

Member Solutions Director

aweeks@limra.com

LOMA Committees

Committee Rosters

Annuity Advisory Board

Member

Gaul, Scott *VP, Head of Individual Business*

Board of Directors

Vice Chair

Feeney, Caroline *Executive Vice President & CEO, U.S. Businesses*

Chief Human Resources Officers Committee

Member

Walia, Vicki *Head of HR, US Businesses, OAS and Global Asset Management*

Financial Crimes Services Committee

Alternate Member

Davis, Jessica *Paralegal*

Board Representative

Suib, Jon Michael *Director, Fraud Detection & Prevention*

Member

Sandor, Thomas *Director - Fraud Detection & Prevention*

FraudShare Governance Council

Alternate Member

Sandor, Thomas *Director - Fraud Detection & Prevention*

Board Representative

Suib, Jon Michael *Director, Fraud Detection & Prevention*

Life Insurance Advisory Board

Member

Hitchcock-Gear, Salene *President, Individual Life Insurance*

LIMRA/LOMA Executive Development Steering Committee (SLE)

Member

Daly, Karen *Vice President, Functions Lead Learning Partner*

LL Global Board Audit Committee

Board Representative

Feeney, Caroline *Executive Vice President & CEO, U.S. Businesses*

LL Global Board Comp & Ben Committee

Board Representative

Feeney, Caroline *Executive Vice President & CEO, U.S. Businesses*

LL Global Board Finance Committee

Board Representative

Feeney, Caroline *Executive Vice President & CEO, U.S. Businesses*

LL Global Board Membership Committee

Board Representative

Feeney, Caroline *Executive Vice President & CEO, U.S. Businesses*

LOMA Compensation Committee

Member

Weinberg, Eric *Vice President, Compensation*

Proposed Member

Condon, Sean *Director, Compensation*

LOMA Employee Benefits Administration Committee

Member

Gabriele, Robert *VP, New Business Onboarding*

Proposed Member

Rustay, Jennifer *Director, Employer Service*

LOMA Enterprise Risk Management Committee

Member

Keller, Kathy *Vice President, Risk Governance and Administration, and Closed Block Executive*

LOMA Group Systems Committee

Proposed Member

McNeal, Ryan *Director*

LOMA Investment Operations Committee

Member

McClure, James *Vice President, Investment Operations*

LOMA Investment Systems Committee

Alternate Member

Krishnan, Mathavan *VP, Solution Architecture Engineer*

Member

Hodge, Jeanne *VP, Solution Architecture Engineer*

LOMA New Business Committee

Member

Miller, Darren *Underwriting Director of Operations*

LOMA Professional Development Council

Member

Gleason, Kevin *Director - Design*

LOMA Treasury Operations Committee

Alternate Member

McCarthy, Joe *Vice President & Assistant Treasurer*

Member

Davi, Susanna *VP & Assistant Treasurer*

Product Development Management Committee

Member

Roberts, Catherine *Product Manager*

Senior Investment Leaders Committee (SILC)

Member

Douglass, Mathew *Senior Managing Director*

U.S. Research Agencies Group (RAG)

Chair

Cooper, Susan *Managing Director*

Committee Opportunities

[click to go to LOMA Committees](#)

Broker-Dealer Operations Committee (BDOC)

The Broker-Dealer Committee assists subsidiary companies in the improvement of product selection, marketing and distribution, administration and operational systems, as they relate to an affiliation with a member parent life insurance company.

Typical Topics Discussed

Improvement of product selection, marketing and distribution, administration and operational systems.

Target Participant

Membership Requirements: Members are usually officers of the Broker-Dealer and/or the parent life company involved in marketing, compliance, operations & administration, or sales.

LOMA Annuity Operations Committee

The Annuity Operations Committee discusses issues, trends, emerging technologies, customer experience and best practices around the issuance, servicing and administration of individual annuities and other registered and non-registered products from new business to the claims process.

Typical Topics Discussed

Discusses issues, trends, emerging technologies, customer experience and best practices around the issuance, servicing and administration of individual annuities and other registered and non-registered products from new business to the claims process.

Target Participant

Membership Requirements:

Members should hold a management level position with functional responsibility for one or more aspects of annuity new business, product administration and/or client services and must actively participate and contribute in committee meeting discussions.

LOMA Applied Technology Committee

The Applied Technology Committee facilitates high-level information exchanges on broad issues including current non-competitive technical, management and best-practices information related to technology, application infrastructures and architectures.

Typical Topics Discussed

Current non-competitive technical, management and best-practices information related to technology, application infrastructures and architectures.

Target Participant

Membership Requirements: Members should have Information Technology executive management experience with broad technology exposure in larger financial services companies with life insurance operations. Members should possess the disciplines that facilitate productive and multifaceted research and discussions.

LOMA Benefits Committee

Committee members are typically high-level employee benefits professionals with substantial responsibilities and expertise in benefits.

Typical Topics Discussed

Benefits design & administration, legislative changes and their impact on employee benefits, and other programs to support employees.

Target Participant

This individual should have expert knowledge of the benefit offerings of the company, as well as how these benefits are selected and administered.

LOMA Chief Actuary Committee

The Chief Actuary Committee provides a forum for Chief Actuaries to discuss trends, strategies, and best practices in all areas that impact chief actuaries, including product development, risk management, financial reporting, investments, tax, talent management and development, education, professionalism, technology and other issues facing the industry.

Typical Topics Discussed

Product development, risk management, financial reporting, investments, tax, talent management and development, education, professionalism, technology

Target Participant

Membership Requirements: Members shall have the title of Chief Actuary, preferably at the enterprise level (or have responsibility for the functions typically performed by the Chief Actuary).

LOMA Contact Center Committee

The Contact Center Committee assists member companies in the improvement of their operations by pooling experience, identifying and suggesting acceptable alternatives and investigating various practices. The committee discusses techniques and strategies in the areas of management, training, effectively using metrics and identifying new tools that can make a call center more productive. The committee explores the use of contact centers in the claims process and in cross-sell/up-sell opportunities.

Typical Topics Discussed

Techniques and strategies in the areas of management, training, effectively using metrics and identifying new tools that can make a call center more productive

Target Participant

Membership Requirements : Members of this committee should have direct responsibility for the operation of their organizations contact center as a whole or a unit within the contact center.

LOMA Ed Rep Roundtable

The Ed Rep Roundtable is a committee of individuals who have been involved in marketing and administering the LOMA education programs in their companies, usually as LOMA Education Representatives. Before adopting rules and regulations, LOMA asks the Ed Rep Roundtable to evaluate the proposals to see if they are practicable. Often the committee evaluates the objective and tells LOMA ways to improve proposals. The committee also provides ideas

concerning the marketing and promotion of the FLMI and other LOMA Professional Development programs. Membership Requirements: Marketing or administrating of the FLMI Program or has a special expertise pertaining to those matters.

Typical Topics Discussed

What's New at Each Company, Addressing your top business challenges (5 things to know), LOMA Societies, Contact Blog, Ed Rep Webinars, LOMA Assessment Products, LOMA Annual Conference, Marketing Update and E&T Overview

Target Participant

Educational Representatives for companies that have strong levels of participation in LOMA education.

LOMA Employee Relations Committee

The Employee Relations Committee identifies and addresses policies, programs, practices and current trends related to a broad range of employee relations issues. Issues of concern include: fostering a corporate culture that facilitates quality; staffing and recruiting; developing employees and managers, managing reductions in force and acquisitions; balancing work and family; and managing diversity.

Typical Topics Discussed

- Succession Planning
- Employee Technology Policies
- Employee Communication
- Employee Recognition
- Performance Management
- Pre-Employment Checks
- Diversity/Inclusion Policies
- Severance Policies

Target Participant

Members are typically human resources professionals with substantial responsibilities and expertise in employee relations and generalist functions.

LOMA Financial Planning & Analysis Committee

The Financial Planning & Analysis Committee identifies and discusses programs, practices, and current trends related to a broad range of financial planning and analysis issues in the financial services industry.

Typical Topics Discussed

Topics addressed include but are not limited to: financial forecasting, allocations, budgeting and planning (including capital budgeting and cost benefit analysis), expense management, improving management reporting as well as tools and technologies employed in these areas.

Target Participant

Membership Requirements: Members should be officer level and have primary responsibility for one or more of the following functions: financial forecasting, allocations, budgeting and planning, expense management.

LOMA Individual Insurance Services Committee-I (IISC-I)

The Individual Insurance Services Committee I assists member companies in the improvement of all aspects of individual insurance service, concentrating on identifying ways to improve and provide customer service by research on specific topics, exchange of information and distribution of reports as appropriate; investigating organizational structures, administrative practices and procedures and promoting the study of topics that focus on customer service as perceived by the customer.

Typical Topics Discussed

All aspects of individual insurance service, concentrating on identifying ways to improve and provide customer service by research on specific topics.

Target Participant

Membership Requirements: Members must have current, substantial and relevant experience in the POS aspects of the life insurance industry and hold a management level, policy-making position. Companies represented on IISC I generally have more than 1.5 million policies in force.

LOMA Individual Insurance Services Committee-II (IISC-II)

The Individual Insurance Service Committee II analyzes individual customer service functions through review of various company operations dealing with policy owners, agents and regulators and by identifying and suggesting acceptable alternatives, investigating various company operations and practices in policyholder services, keeping in mind the perception by the customer.

Typical Topics Discussed

Customer service functions through review of various company operations dealing with policy owners, agents and regulators and by identifying and suggesting acceptable alternatives, investigating various company operations and practices in policyholder services, keeping in mind the perception by the customer.

Target Participant

Membership Requirements: Members must have current, substantial and relevant experience in the POS aspects of the life insurance industry and hold a management level, policy-making position. Companies represented on IISC II generally have less than 1.5 million policies in force.

LOMA Individual Products Systems Committee

The Individual Products Systems Committee investigates and shares experiences related to the development of product administration systems and other systems that support individual life and related products. Membership Requirements: Members are senior-level executives with substantial responsibilities and expertise in individual systems and/or product development and support.

LOMA Learning and Development Committee

The Learning and Development Committee provides a forum for members to exchange ideas and experiences, gather helpful information, and initiate, shape, and evaluate research. Issues discussed at Committee meetings include all topics within the field of learning and development, such as the role and organization of the learning and development function, learning-related technology and e-learning, employee development, management development, leadership development, assessments of learning and development program effectiveness, and methods to align employee development with corporate goals and strategies. Membership Requirements:

Members are experienced learning and development personnel who are responsible for initiating and overseeing planning and implementation of learning and development.

Typical Topics Discussed

All topics within the field of learning and development, such as role and organization of the learning and development function, learning-related technology and e-learning, employee development, management development, leadership development, assessments of learning and development program effectiveness, and methods to align employee development with corporate goals and strategies.

Target Participant

Experienced learning and development personnel who are responsible for initiating and overseeing planning, implementation, and assessment of various learning and development initiatives.

LOMA Operations Leaders Committee

The Operations Leader Roundtable provides a forum for senior-level operations executives in LOMA member companies to discuss ideas and share concerns that relate to objectives and strategic approaches for operational efficiency in the financial services sector. Membership Requirements: Members of the Operations Leader Roundtable are Chief Operations Officers or other senior-level executives (EVP, SVP, VP) from Life Insurance Companies that are corporate members of LOMA. Roundtable members have responsibility for enterprise wide strategic decision making within their respective companies.

Typical Topics Discussed

Discussions include ideas and shared concerns that relate to objectives and strategic approaches for operational efficiency in the financial services sector.

Target Participant

Members of the Operations Leader Roundtable are Chief Operations Officers or other senior-level executives (EVP, SVP, VP) from Life Insurance Companies that are corporate members of LOMA

LOMA Strategic Recruitment and Selection Committee

The Strategic Recruitment and Selection Committee shares company policies and practices that relate to recruiting qualified job candidates and selecting the best employees for the organization. Trends in the area of recruiting and selection are also discussed.

Typical Topics Discussed

- Workforce planning
- Social networking
- Artificial intelligence
- Retention strategies
- Applicant Skill Gaps
- Diversity recruiting
- Employment web testing
- Applicant Tracking Systems
- Assessment of “soft” skills
- Measuring recruiting effectiveness
- Nontraditional sourcing strategies

Target Participant

Members have responsibility for the recruitment and selection function in their companies.

LIMRA Committees

Committee Rosters

2024 Annual Conference Committee

Co-Chair

Hitchcock-Gear, Salene *President, Individual Life Insurance*

2024 Chief Marketing Officers

List Contact

Frey, Michele *VP & CMO, Individual Life*

Mahaffrey, Lisa *VP*

Trivedi, Ketty *VP, Marketing*

Wassmann, Brian *VP & CMO*

Advanced Sales Committee

Member

Scalero, Donna *Vice President, Advanced Planning*

Agency Building Committee

Immediate Past Chair

Kinsella, Terri *VP, Sales Enablement & Learning*

Annuity Advisory Board

Member

Gaul, Scott *VP, Head of Individual Business*

Annuity Committee

Member

Abernathy, Ryan *VP*

Amari, Suzanne *Vice President, Head of Annuities Product*

Annuity Distribution Committee

Member

Mallavia, Donald *Senior Vice President, National Sales Manager*

Board of Directors

Vice Chair

Feeney, Caroline *Executive Vice President & CEO, U.S. Businesses*

Brokerage Committee

Conference Chair

Cline, Keita *VP, Sr Strategic Relationship Manager*

Data Exchange Standards Committee

Member

Bycroft, Sherri *Director Platform Relationships*

Pieros, Angelo *Director Technical Systems Analysis - Client Data Management*

Distribution Leaders Roundtable Committee

Member

Brayton, Kevin *Vice President, Distribution & Sales - Individual Life*

Diverse Markets Committee

Member

Daring, Laurel *Director, Multicultural Marketing*

Enrollment Technology Strategy Seminar Planning Committee

Member

Cook, Brandon *Director Relationship Management*

Foster, Melissa *Enrollment Solutions Director*

Field Development and Performance Committee

Member

Daddino, Dawn *Vice President, Learning*

Financial Management Research Committee (FMRC)

Member

Garlick, Bryan *VP Compensation*

FraudShare Governance Council

Alternate Member

Sandor, Thomas *Director - Fraud Detection & Prevention*

Board Representative

Suib, Jon Michael *Director, Fraud Detection & Prevention*

Independent Producer Committee

Member

Winkler, Douglas *Vice President, Independent Sales & Distribution*

Life Insurance Advisory Board

Member

Hitchcock-Gear, Salene *President, Individual Life Insurance*

LL Global Board Audit Committee

Board Representative

Feeney, Caroline *Executive Vice President & CEO, U.S. Businesses*

LL Global Board Comp & Ben Committee

Board Representative

Feeney, Caroline *Executive Vice President & CEO, U.S. Businesses*

LL Global Board Finance Committee

Board Representative

Feeney, Caroline *Executive Vice President & CEO, U.S. Businesses*

LL Global Board Membership Committee

Board Representative

Feeney, Caroline *Executive Vice President & CEO, U.S. Businesses*

Marketing Committee

Member

Hilliard, Tracy *Marketing Manager*

Proano, John *Director, Customer Engagement and Omni-channel Marketing*

PRT - Pension Risk Transfer Committee

Co-Chair

O'Brien, Glenn *Managing Director, Institutional Investments*

Member

Hyten, Alex *VP, Head of Institutional Retirement Strategies*

The Supplemental Health, DI & LTC Committee

Member

DeSousa, Amanda *Director of Voluntary Product Mgmt & Development*

U.S. Research Agencies Group (RAG)

Chair

Cooper, Susan *Managing Director*

Workplace Benefits Program Committee

Member

Das, Bijit *VP, Head of Voluntary Benefits & Growth Enablement*

Committee Opportunities

[click to go to LIMRA Committees](#)

Direct to Consumer Distribution Committee

Provides overall guidance to LIMRA's direct-to-consumer program. Provides a forum for discussion of current trends in direct-to-consumer marketing with a focus on understanding the art and science of engaging consumers on a direct basis. Organizes direct-to-consumer content at LIMRA's annual Distribution Conference for Financial Services. Committee members represent organizations actively involved in leveraging direct-to-consumer strategies as a method of customer acquisition. The ideal candidate for the committee is an individual, vice president or above, accountable for the organization's direct-to-consumer strategy. An individual in this role typically engages with other areas of the company such as product, marketing, IT and contact centers, to successfully execute the organization's direct-to-consumer strategy. The direct-to-consumer program may include direct mail, television, telemarketing, web, digital and social media efforts. Committee members represent both product manufacturers and distribution organizations. Every member is responsible for participating in committee activities within the framework of its operating bylaws. Each member should contribute to the planning of meeting programs, suggest discussion topics, serve on subcommittees, and cooperate with the chair (and co-chair) in the committee's operation. Membership shall be limited to no more than one representative from the same company, unless the individuals represent distinctly different direct-to-consumer operations within a company.

Typical Topics Discussed

Best practices in DTC Marketing, Operations and Product; Technology, KPI's, Customer Engagement Models, Successes and lessons learned.

Target Participant

Committee members represent organizations actively involved in leveraging direct-to-consumer strategies as a method of customer acquisition. The ideal candidate for the committee is an individual, vice president or above, accountable for the organization's direct-to-consumer strategy. An individual in this role typically engages with other areas of the company such as product, marketing, IT, and contact centers to successfully execute the organization's D2C strategy.

Multiple-Line Exclusive Agent Committee

The Multiple-Line Exclusive Agent Committee meets in-person three times per year to provide an open forum for discussion of relevant issues. The group offers guidance on LIMRA distribution research of interest to MLEA companies and assists with planning the annual Distribution Conference for Financial Services.

Typical Topics Discussed

Field recruiting, retention, development, compensation, management, cross-selling and field support.

Target Participant

Distribution leaders shaping channel growth strategies at companies that sell property-casualty and life insurance products through multiple-line exclusive agents.

Regulatory Compliance Committee

Purpose: This committee discusses and benchmarks current regulatory and compliance issues, and assists in planning and developing compliance content for the program for the conferences and webinars. Quick benchmarking surveys from and to the committee help RCC members understand

industry trends and practices. In addition, this committee helps provide direction to LIMRA and LOMA on research, networking opportunities, and business solutions that have compliance and regulatory impact in the industry.

Meetings: This committee meets on the second Monday of each month from noon - 1pm, eastern time, via webex. In-person meetings, during non-pandemic times, happen at LIMRA in the fall and at a LIMRA conference.

Typical Topics Discussed

Regulations, Exams, Suitability, Advertising Review, Cybersecurity, Privacy, Surveillance, Fiduciary, Best Interest, Fraud, TPSP Monitoring and Oversight, SEC, NAIC, FINRA, and other Regulatory Bodies.

Target Participant

Compliance and legal executives responsible for regulatory compliance-related issues.

Retirement Plans Committee

The purpose of the Committee is to discuss and assess evolving business models in the retirement plan services industry. The group may periodically invite experts to provide additional insight on selected topics. Areas of discussion include distribution and service models, acquisition models, business alliances, regulatory compliance, training needs, executive development and succession planning. The group also serves as an advisory body for the LIMRA Retirement Industry Conference. This Committee is recommended for senior leaders within their organization's retirement plans business unit. Membership is by Invitation only.

Typical Topics Discussed

Regulatory environment, Macro Trends, i.e., state initiatives, MEPs, Gig Economy, RIC.

Target Participant

Senior Level Product, Strategy and/or Marketing Executives. Heads of P&L, Direct Reports to CEO.

Strategy & Innovation Committee

The committee is responsible for providing direction on research, networking opportunities, and business solutions associated with advanced strategic planning and applied innovation. It provides a forum for discussion of current trends, strategies, academic research and thinking. In addition, the committee regularly invites experts to address research and applied science in the field. Members of the committee are those leading their organizations' strategy and or innovation disciplines.

LIMRA Study Groups

Study Group Rosters

Account Management Study Group

List Contact

Cirlot, Robert RVP Small Market Account Management
de Poortere, Melissa Director, Client Services
Dermovsesian, Carmen Regional Account Director
Duane, Tara Director, Client Services
Frost, Jeffrey Director, Client Services
Jones-Foster, Charlene Director, Client Management
Matias, Nina Regional Account Director
Morgan, Kevin Vice President
Ortiz, Rigo Director, National Accounts

Advanced Analytics Study Group

List Contact

Corso, Melissa VP, Data Analytics

Advisor Retention & Productivity Forum

List Contact

Hearn, Brad President, Prudential Advisors - Retail Advice and Solutions
Hynes, Patrick VP, Business Development and Head of Field Sales

Agency Distribution Study Group

List Contact

Verrios, Angela VP, Marketing & Leads

AI Governance Group

Member

Huntsman, Robert Chief Data Scientist - U.S Businesses

Annuity Research Study Group

List Contact

Champi, Andrew VP, Term, Specialty Solutions & Innovation
McCoy, David Director, Competitive Analysis
Potje, Ivan Director - Product Intelligent
Rhodes, William Strategy
Turner, Aaron Product Manager - Annuities Research

Customer Experience Study Group

Member

Elliott, Danielle Vice President, Strategic Advisory Solutions

Samuel, Michelle VP and Head of Customer Experience

Digital Strategy Study Group

List Contact

D'Aprile, Lisa Digital Marketing Manager

Kasper, Walter Director Strategic Initiatives

Distribution Leaders Roundtable

List Contact

Brayton, Kevin Vice President, Distribution & Sales - Individual Life

Hearn, Brad President, Prudential Advisors - Retail Advice and Solutions

Winkler, Douglas Vice President, Independent Sales & Distribution

Enrollment Technology Study Group

List Contact

Barrera, Gil Director, Platform Relationships

Gabriele, Robert VP, New Business Onboarding

Field Officers Round Table

List Contact

Buckley, Moira Vice President, Western Territory

Copenhaver, Vance Vice President, Operations and Controls

Holtmeier, Dawn Vice President, Strategic Initiatives

Individual Life Study Group

List Contact

Martin, Andrew VP, Product Strategy

Leave Management Strategy Study Group

List Contact

Capko, Jamie Director, Disability Product Management

Low-Interest Rate Executive Task Force Study Group

List Contact

Campion, Scott VP Corporate Strategy Domestic

Not-for-Profit Study Group

List Contact

Miller, Lynda Sue Vice President - 403(b)/457 Market Segment

Noone, Bill Director, Product Management

Product Development Study Group

List Contact

Redding, Andrew Director Product Strategy

Retirement Income Strategies Study Group

List Contact

Corasaniti, Ralph VP, Future Growth

Retirement Plans Study Group

List Contact

Noone, Bill Director, Product Management

Stable Value Study Group

Member

Barrasso, John Managing Director

Diskin, James Vice President

Grove, Timothy Vice President, Retirement

Voluntary Benefits Study Group

Member

DeSousa, Amanda Director of Voluntary Product Mgmt & Development

Voluntary/Worksite Benefits Regulatory & Compliance Study Group

List Contact

Classic, Melanie VP, Product Filing & Implementation

Patel, Mili Director, Corporate Counsel

Women Executive Study Group

List Contact

Buckley, Moira Vice President, Western Territory

Feeney, Caroline Executive Vice President & CEO, U.S. Businesses

Hitchcock-Gear, Salene President, Individual Life Insurance

Sainato, Suzanne Vice President & Chief Compliance Officer - Assurance

Study Group Opportunities

[click to go to LIMRA Study Groups](#)

Canadian Annuity Study Group

Target membership: Representatives from insurers in the individual annuity market. The group meets to discuss annuity issues affecting study group members and their companies. The group also helps plan SRI's Canadian annuity research program.

Typical Topics Discussed

Issues dealing with GIAs, Segregated Fund contracts, wealth management products, accumulation or payout products (can include company practices, regulations. etc.)

Target Participant

Representatives from Canadian member companies. This group helps plan the SRI's Canadian Annuity Research Program.

Individuals dealing with accumulation and/or payout annuities -- Managers/Directors/AVP of products, product development; savings, investments, retirement, wealth insurance products.

Canadian Contact Centre Study Group

This study group, made up of executives and directors that oversee sales and service centers, meets annually to provide an opportunity for your sales and service centers to network among peers on challenges and best practices in areas such as operations, sales, technology, recruiting, training, turnover, and management. Attendees will also learn the latest LIMRA research on workforce and distribution issues. For more information on study group participation please contact the staff representative.

Typical Topics Discussed

Contact centre management, staff development, administration issues.

Target Participant

Heads of contact centres

Canadian Individual Life Study Group

The Canadian Individual Life Study Group provides a forum for the discussion of current individual life insurance trends and emerging issues in Canada. The study group also provides overall guidance for LIMRA's individual life insurance research program as needed.

Typical Topics Discussed

Product regulation, distribution issues, technological innovation, underwriting.

Target Participant

Study group members represent individual life insurance direct writers in Canada who are members of LIMRA. The ideal candidate for the study group is a person who has overall leadership responsibility for the company's individual life insurance product development, product management, marketing, or related functions.

Defined Contribution Income Strategies Roundtable

Mission The purpose of the Roundtable is to discuss issues related specifically to the development, marketing and sales of guaranteed income products made available to defined contribution plan participants through an employer-sponsored plan. As this is a new and rapidly expanding product category, the discussion will examine all aspects of product manufacture and distribution.

Membership This Study Group is recommended for individuals responsible for developing in-plan guaranteed income products and marketing programs. These may include the Retirement Plans, Retirement Income or Annuity businesses within their organization. Limit of three representatives per organization.

Typical Topics Discussed

Administration, Philosophical quandaries ie., Are 401 (k)s the right vehicle for income solutions? Regulatory challenges, Portability, Products and services beyond (and including in-plan) annuities, Product Innovation.

Target Participant

Mid to Senior Level Product Development, Investment Management or Strategic roles in In-Plan Retirement Income Product Development, Marketing or Strategy.

Dental Study Group

To provide a forum for LIMRA member companies in the Dental Benefits market to get together and discuss the unique challenges, opportunities and solutions associated with the Dental product. The focus includes, but will not be limited to, provider networks, marketing and distribution, risk and product management, regulatory environment, immediate needs and long-term strategies.

Typical Topics Discussed

The format is a roundtable, open discussion. The agenda will be built from the topics that are submitted on the registration form by the study group participants. Moderators will lead the discussion sessions. Please note: each participant is required to submit at least two topics for discussion.

Target Participant

We invite senior executives responsible for the dental product. Each LIMRA member company will be limited to one representative. An exception will be made to allow two attendees if they represent two different areas of responsibility.

Reinsurance Study Group

The Reinsurance Study Group provides a forum for reinsurance companies to discuss individual life insurance trends and emerging issues affecting both reinsurance and direct companies.

Typical Topics Discussed

Cession rates, actuarial trends including underwriting and mortality, regulation, innovation/disruption, and other top-of-mind current life insurance issues

Target Participant

Study group members represent individual life insurance reinsurance writers in the United States who are members of LIMRA. The ideal candidate for this study group is a person who has overall leadership responsibility for the reinsurance company's individual life insurance product development, marketing, or sales related functions.

Workplace Benefits Competitive Intelligence Study Group

To provide an open forum for LIMRA member companies in the Workplace Benefits market to discuss the unique challenges and opportunities related to gathering and utilization of competitive intelligence. As this is a peer-level study group, we encourage senior level attendees. All participants are expected to be an active participant in all discussions.

Typical Topics Discussed

Participants are encouraged to submit discussion topics in advance as the final meeting agenda will be developed based upon topics submitted by participants. Volunteers will lead each discussion topic.

Target Participant

Individuals from a LIMRA member company who are responsible for the competitive intelligence unit of their workplace benefits division. All participants should be very experienced in their field. Each LIMRA member company will be limited to one representative. This meeting is by invitation only. The maximum number of attendees will be limited to the first 20 registrants per meeting.