PROGRAM

2016 DISTRIBUTION CONFERENCE FOR FINANCIAL SERVICES

FEBRUARY 24 – 26, 2016 • HILTON MIAMI DOWNTOWN • MIAMI, FL

The New Mosaic — Picture Your Place

CELEBRATING 100 YEARS 1916 - 2016 LIMRA®

THE 2016 DISTRIBUTION CONFERENCE FOR FINANCIAL SERVICES

The New Mosaic — Picture Your Place

DISTRIBUTION OF WORKSHOPS

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

	THURSDAY, February 25 10:30 to 11:30 a.m.	THURSDAY, February 25 1:00 to 2:00 p.m.	THURSDAY, February 25 2:15 to 3:15 p.m.	FRIDAY, February 26 8:00 to 9:00 a.m.
Agency-Building	3. Complementing Advisors With Client-Centric Innovation *(Concerto Ballroom A)*	7. The Future of Field Leadership *(Concerto Ballroom A)*	12. Home Office Virtual Support for Advisors — New Dimensions Supporting Success *(Concerto Ballroom A)*	17. Improving the Perception of the Industry *(Concerto Ballroom A)*
MLEA	4. Strategies for the Next Generation *(Concerto Ballroom B)*	8. Big Data at Field Force Finger Tips *(Concerto Ballroom B)*	13. Enabling Exclusive Agents for Multi-Line Success *(Concerto Ballroom B)*	17. Improving the Perception of the Industry *(Concerto Ballroom A)*
Independent Producer	4. Strategies for the Next Generation *(Concerto Ballroom B)*	9. Successful Succession Planning: Illusion or Reality? *(Concerto Ballroom C)*	14. Case Count Crisis *(Concerto Ballroom C)*	18. Automate This! Season 2 *(Concerto Ballroom B)*
Brokerage	5. Things You Should Be Worried About *(Concerto Ballroom C)*	10. Investments and Insurance: A Marriage Made in Heaven? *(Picasso)*	15. Is Your Message Getting Through? *(Picasso)*	18. Automate This! Season 2 *(Concerto Ballroom B)*
Direct-to-Consumer	6. The Call for Contact: Trends That Will Shape the Contact Center of the Future *(Concerto Ballroom D)*	11. Direct to Consumer Multi-Channel Distribution *(Concerto Ballroom D)*	16. The Next Frontier: Web-Based Sales Without the Human Touch? *(Concerto Ballroom D)*	19. Leveraging Service for Sales *(Concerto Ballroom C)*

Wednesday, February 24

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

Concerto Ballroom A

VA1. Evaluating Market Opportunity to Achieve Distribution Efficiencies and Expansion

PHIL BROWN, Leader, Customer Experience, LIMRA

Concerto Ballroom B

VA2. One Size Fits None

BREANA MACKEN, Assistant Research Director, Distribution Research, LIMRA; **SARAH A. SCHMIDT, ACS, ALMI,** Instructional Design & LMS Consultant, Assessment and Development Solutions, LIMRA

FEMALE LEADERSHIP RECEPTION — *5:00 to 5:45 p.m.*

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

For LIMRA members only. Check at Registration Desk for room location.

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

Symphony Ballroom I

HOSPITALITY RECEPTION — *5:00 to 6:00 p.m. and 7:00 to 8:30 p.m.*

Gallery Lounge

Sponsored by IMN

Members and carriers only.

Thursday, February 25

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

Symphony Ballroom I

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

Symphony Ballroom II/III/IV

The New Mosaic — Picture Yourself

JAMES W. KERLEY, LLIF
Chief Membership Officer, LIMRA & LOMA
LL Global Services, Inc.

The Omni-Channel Imperative: Bridging the Experience Gap to Meet Consumers on Their Terms

JOHN W. CHANDLER JR.
Senior Vice President, Chief Marketing Officer
MassMutual Financial Group

Market Conditions Don't Determine Growth…You Do!

MARK KING
President, adidas Group North America
Chairman, TaylorMade Golf Company

REFRESHMENT BREAK — *10:00 to 10:30 a.m.*

Symphony Ballroom I

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

Concerto Ballroom A

3. Complementing Advisors With Client-Centric Innovation (AB)

STEVE GARRITY, COO and Founder, Hearsay Social; **ROB NEWMAN,** Managing Partner, National Planning Corporation; **PETER PETERSEN,** Director, Strategy and Shared Operations, Northwestern Mutual Life Insurance Company; *Moderator:* **JESSICA MADIGAN,** Director Leadership Development, Securian Financial Group

Concerto Ballroom B

4. Strategies for the Next Generation (MLEA/IP)

NATE PEARCE, Regional Sales Manager, MetLife Auto & Home; **DANIEL TORSAK,** Chief Operating Officer, Paradigm Life; *Co-moderators:* **MICHAEL DUNNE,** Assistant Vice President, Independent Financial Network Strategic Alliances, Penn Mutual Life Insurance Company; **ELLEN KUGEL,** Director – MPCG/P&C Alliance and PCS Sales, MetLife

Concerto Ballroom C

5. Things You Should Be Worried About (BR)

JAMES A. POOLMAN, President, Jim Poolman Consulting, Inc.; **JAMES P. PUHALA III,** Vice President – US IG Compliance, MassMutual; *Moderator:* **MARK PETERSON,** Senior Vice President, Life Brokerage, AIG Life and Retirement

Concerto Ballroom D

6. The Call for Contact: Trends That Will Shape the Contact Center of the Future (DC)

NORAH DENLEY, Assistant Research Director, LIMRA; **RHONDA GIACOMARRA,** Client Relations Director, Contact Center Services, Assessment, Development Solutions, LIMRA

LUNCHEON — *11:30 a.m. to 1:00 p.m.*

Symphony Ballroom I

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

Concerto Ballroom A

7. The Future of Field Leadership (AB)

LAILA HICK, Vice President, Northwestern Mutual Life Insurance Company; **DONALD OTTO,** Vice President, MetLife Premier Client Group; *Moderator:* **SARAH L. KOENIG, J.D., CLU, LTCP,** Director – Field Growth and Development, Northwestern Mutual Life Insurance Company

Concerto Ballroom B

8. Big Data at Field Force Finger Tips (MLEA)

DAVE EDINGTON, Senior Vice President, Epsilon; *Moderator:* **JOHN MURPHY,** Vice President, Marketing Development & Education, The Horace Mann Companies

Concerto Ballroom C

9. Successful Succession Planning: Illusion or Reality? (IP)

KIM SIEGERS, CGA, CPA, Director, Business Transitions and Advisor Teaming, Great-West Life Assurance Company; **TRACEY SMITH, CPA, FLMI,** Vice President, Distribution Operations & Finance, Ameritas Life Insurance Corp.; *Moderator:* **NICHOLAS BARISHIAN, LLIF,** Second Vice President, General Agencies, Boston Mutual Life Insurance Company

Picasso

10. Investments and Insurance: A Marriage Made in Heaven? (BR)

BLAKE MOHR, CEO, Capitas Financial, Inc.; **BLAIR O'CONNOR,** Senior Vice President, Sales, Producers Choice Network; *Moderator:* **JOHN L. KNOWLES JR., CLU,** Vice President, Head of MGA Relationship Management, Lincoln Financial Group

Concerto Ballroom D

11. Direct to Consumer Multi-Channel Distribution (DC)

JOEL SCHWARTZ, Head of Marketing & Finance, Colonial Penn Life Insurance Company

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

Symphony Ballroom I

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

Concerto Ballroom A

12. Home Office Virtual Support for Advisors — New Dimensions Supporting Success (AB)

JENNIFER GLOVACKI, CLU, ChFC, Vice President, Member Care Services, Thrivent Financial; **YVES PIETRACOUP,** Director, Training & Development, Sun Life Financial; *Moderator:* **ROBERT POPAZZI, CLU, CHS, BA,** Assistant Vice President, Sales Force Growth and Development, Sun Life Financial Distributors (Canada) Inc.

Concerto Ballroom B

13. Enabling Exclusive Agents for Multi-Line Success (MLEA)

SIMON REED, Leadership Enterprise Development, State Farm; **JOHN RENTZ,** Associate Vice President, Nationwide Financial; **DON SANDS,** Vice President Strategic Distribution, Allstate Financial; *Moderator:* **SUE BEIGIE,** Marketing and Sales Director, State Farm

Concerto Ballroom C

14. Case Count Crisis (IP)

LUKE COSME, Senior Vice President, Chief Sales and Marketing Officer, Mutual Trust Life Insurance Company; *Moderator:* **JOHN DELPOZZO, CLU,** Senior Vice President, PGA Distribution, Ohio National Financial Services

Picasso

15. Is Your Message Getting Through? (BR)

JANE DEMUTH, Director, Marketing Communications, Crump Life Insurance Services; **KIRSTEN LEES,** Vice President of Channel Marketing, AIG; *Moderator:* **CRAIG KLENK,** Vice President, Sales, Independent Marketing Group, American National Insurance Company

Concerto Ballroom D

16. The Next Frontier: Web-Based Sales Without the Human Touch? (DC)

DOUG BAKER, President & CEO, Teachers Life

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

Symphony Ballroom I

Sponsored by Hilton Miami Downtown

GENERAL SESSION — *3:45 to 4:45 p.m.*

Symphony Ballroom II/III/IV

Selling in a Social World

DEBRA JASPER, Ph.D.
Founder and CEO
Mindset Digital

BETSY HUBBARD
Founder and President
Mindset Digital

LIMRA'S CENTENNIAL CELEBRATION! — *6:00 to 8:00 p.m.*

Sponsored by Greater Miami Convention & Visitors Bureau

Vizcaya Museum and Gardens

Join us to celebrate LIMRA's 100th Birthday sponsored by the Miami Convention & Visitors Bureau and their Partners. Your support and participation has helped us create a remarkable legacy — one that we want to continue for many years to come. Please join us at the breathtakingly beautiful Italian Renaissance gardens of Villa Vizcaya as we celebrate a century of service to you.

Buses leave the Hilton at 5:45 p.m.

Buses leave Vizcaya at 8:00 p.m. to return to the Hilton Downtown Miami.

Dress Code: The dress code is business casual. Let us emphasize for the ladies — comfortable flat shoes are strongly suggested as the grounds and stone terrace are uneven and high-heels will likely get stuck in the crevices. Wedges, flats, or non-stiletto heels are recommended for your comfort.

Friday, February 26

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

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

17. Improving the Perception of the Industry (AB/MLEA)

JESSICA GAUDIO, Director, MyPath™ at The Institutes; **MATTHEW GIBSON,** Vitality Sales & Distribution VP, John Hancock; **GARETH ROSS,** Senior Vice President, U.S. Insurance Group, MassMutual; *Moderator:* **ROB QUESNEL,** Life Sales Director, American Family Life

Concerto Ballroom B

18. Automate This! Season 2 (IP/BR)

RONALD C. ALEXANDER, CFP, Senior Vice President, Crump Life Insurance Services; **MARTY JOHNSON, CLU, AALU, FLMI,** Vice President, Underwriting, Mutual of Omaha Insurance Company; **STEPHEN ROBINSON,** Vice President, IMO Sales Leader, Legal & General America; **DEBRA SMITH,** Senior Vertical Account Manager, LexisNexis; *Moderator:* **ERIC P. MILLER,** Vice President, US Life and Annuity Sales, Independent Order of Foresters

Concerto Ballroom C

19. Leveraging Service for Sales (DC)

DEBRA G. ROBINSON, CCMC, Director, Customer Care Operations, Member Services, Thrivent Financial; **ROBERT J. WHITESEL,** Line Manager, Vanguard Annuity & Insurance Services; *Moderator:* **JOHN HAWK SR., LUTCF, FSS, ALMI, ACS,** Director, General Manager, Direct Sales, AAA Life

REFRESHMENT BREAK AND EXHIBITOR PRIZE DRAWING — *9:00 to 9:30 a.m.*
Symphony Ballroom I
Sponsored by Laser App Software

GENERAL SESSIONS — *9:30 to 11:15 a.m.*
Symphony Ballroom II/III/IV

The DOL Fiduciary Proposal: Positioning for Change

AARON KLEIN
CEO
Riskalyze

CHRISTOPHER RAHAM
Principal Financial Services Office
EY

W. MARK SMITH
Partner
Sutherland Asbill & Brennan LLP

SCOTT STOLZ, CFP
Senior Vice President, Private Client Group
Raymond James

The Evolution of Advice

PATRICK T. LEARY, LLIF
Corporate Vice President,
Distribution Research
LIMRA

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.

2017 DISTRIBUTION CONFERENCE FOR FINANCIAL SERVICES

March 1–3, 2017

Fort Lauderdale Harbor Beach Marriott Resort & Spa • Fort Lauderdale, FL

Thank You to Our Conference Sponsors and Exhibitors

Elite Strategic Partner

hearsaysocial

Digital Training Strategic Partner

mindset digital

Strategic Partners

distribion

pinpoint
Global Communications

HOOPIS
PERFORMANCE NETWORK

WATERING CAN
Growing Kids with Character

Sponsors

Adobe

Hilton
MIAMI DOWNTOWN

INSURANCE MEETING NETWORK
IMN

LASER APP
SOFTWARE

MIAMI
GREATER MIAMI CONVENTION & VISITORS BUREAU

Exhibitors

Allego
Benchmark Business Group
eKomi
EquiSoft
Financial Services Educational Network
Insurance Technologies
Intellect SEEC
Knock Out Networking, LLC
LEAP Systems
Majesco
Maritz Motivation Solutions
Qlik
Qvidian
Royal Caribbean International
se2
Securities Training Corporation
Spinnaker Analytics
StoneRiver
The American College
Vertafore
Vue Software

CELEBRATING 100 LIMRA YEARS 1916-2016

005249-0216 (50700-10-601-17010)