

# PROGRAM

## 2016 GROUP & WORKSITE BENEFITS CONFERENCE

SEPTEMBER 13 – 15, 2016 • NEWPORT MARRIOTT • NEWPORT, RI

*Insurance, Interrupted*





# 2016 Group & Worksite Benefits Conference

## Tuesday, September 13

**MEET AND GREET** — 1:30 to 2:00 p.m.

South East Foyer

**WELCOME AND OPENING REMARKS** — 2:00 to 2:30 p.m.

Grand Ballroom

**SEAN F. O'DONNELL, LLIF**

Vice President, Member Relations and Consulting  
LIMRA

**GENERAL SESSION 1** — 2:30 to 3:30 p.m.

Grand Ballroom

**Inside the White House, Current Events and the 2016 Presidential Election**



**ANN COMPTON**

Legendary ABC News White House  
Correspondent (1973-2014)

**NETWORKING BREAK** — 3:30 to 4:00 p.m.

South East Foyer

**CONCURRENT SESSIONS** — 4:00 to 5:00 p.m.

Freedom

### 1. BIG Data...BIG Impact

**DOUG MELTON, Ph.D., MPH**, Director of Customer Analytics, Cigna; **Moderator: ALYSSA ZABLOUDIL, FSA, MAAA**, Product Performance Director, Mutual of Omaha

Weatherly

### 2. From Old School to New Cool

**JA'NENE KANE**, Vice President, Worksite Enrollment Services, MassMutual; **PAT SIR**, President, healthiestyou; **Moderator: BRAD JOHNSON**, Vice President, Specialty Product, United Healthcare

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

South East Foyer

(All registered attendees and guests are welcome.)

## Wednesday, September 14

**BREAKFAST** — 7:30 to 8:15 a.m.

South East Foyer

Sponsored by FINEOS

**GENERAL SESSION 2** — 8:15 to 9:30 a.m.

Grand Ballroom

### A View From the Top



**DANIEL R. FISHBEIN, M.D.**

President  
Sun Life Financial U.S.



**AMY C. FRIEDRICH**

Senior Vice President, Speciality Benefits  
Principal Financial Group



**ERIC M. REISENWITZ**

Senior Vice President, Group Protection,  
Market Solutions  
Lincoln Financial Group



**GENE F. LANZONI**, Moderator

Assistant Vice President, Market Intelligence  
Guardian Life Insurance Company of America

**NETWORKING BREAK** — 9:30 to 9:45 a.m.

South East Foyer

## CONCURRENT SESSIONS — 9:45 to 10:45 a.m.

Enterprise

### 3. Executive Round Table Discussion

(Pre-registration for this session is required.)

Moderator: **GENE F. LANZONI**, Assistant Vice President, Market Intelligence, Guardian Life Insurance Company of America

Freedom

### 4. The Ideal Service Model: Self-Service and Personal Engagement

**CHRISTOPHER RYAN**, Vice President, Strategic Advisory Services, ADP; Moderator: **DAYNA KIRK**, Assistant Vice President Voluntary Business Development, The Standard

Weatherly

### 5. The Very Latest in Product Ancillary Design, Underwriting, and Enrollment

**KAMRAN MALIK**, Consulting Actuary, Wakely Actuarial; **JAMIE RANICAR**, Assistant Vice President, Market Intelligence, Lincoln Financial; **DEBORAH VANDEVENTER**, Vice President, Voluntary Benefits Underwriting and Consumer Solutions Group, Unum; **ALYSSA ZABLOUDIL**, FSA, MAAA, Product Performance Director, Benefits Solutions Division, Mutual of Omaha; Moderator: **BARBARA S. STEWART**, CFP, President, Washington National

## NETWORKING BREAK — 10:45 to 11:00 a.m.

South East Foyer

## CONCURRENT SESSIONS — 11:00 a.m. to 12:00 noon

Freedom

### 6. The Impact of Startups on Our Industry

**ANDREW PITZ**, Associate, Transamerica Ventures; **GORDY STEAD**, Vice President, Investments, Gibraltar Ventures, the VC Group of Prudential; Moderator: **HOLLY LEAN**, MBA, ALMI, Senior Manager, Strategic Planning, Aflac

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### 7. Thinking Outside the Product Box

**AMBER BINFORD**, Product Development, Assistant Director, The Hartford; **BILL BADE**, FSA, MAAA, Consulting Actuary, Milliman; **ELIZABETH INCZE**, SPHR, CLU, ChFC, Vice President, Product Development, Aetna; **SHARON PARSONS**, Integration Product Category, Humana; Moderator: **KEVIN KEARNEY**, GBA, CMS, Director, Service Operations, Aetna Life Insurance Company

## LUNCHEON “HOT TOPICS” — 12:00 noon to 1:15 p.m.

Grand Ballroom

## CONCURRENT SESSIONS — 1:15 to 2:15 p.m.

Freedom

### 8. Employee Benefit Budgets — The Choice Between Retirement & Healthcare Spending

**VINAY GIDWANEY**, Co-Founder and Chief Product Officer, Maxwell Health; **DR. STEVE NEELEMAN**, Founder and Vice Chairman, Health Equity; **JAMES OCAMPO**, Assistant Vice President, MassMutual; Moderator: **ALAN MARSHALL**, Vice President, E-Commerce, Transamerica

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### 9. Designing Benefits Products for Tomorrow’s Workplace

**CARLOS BELLO**, Director, Product and Market Development, Unum; **JOCELYN GREGA**, Assistant Vice President, Unum; **ANITA POTTER**, Assistant Vice President, Insurance Research, LIMRA; Moderator: **BARBARA NASH**, Vice President, Corporate Research, Unum

## NETWORKING BREAK — 2:15 to 2:30 p.m.

South East Foyer

## CONCURRENT SESSIONS — 2:30 to 3:30 p.m.

Freedom

### 10. Can You Keep Up? Disability Freakonomics

**MARTI CARDI**, Esq., Vice President of Product Compliance, Matrix Companies; **KRISTIN TUGMAN**, Ph.D., CRC, LPC, Vice President, Health and Productivity Analytics and Consulting Practice, Prudential Group Insurance; Moderator: **JENNIFER PARMELEE WITT**, FLMI, ACS, Director, Competitive Analysis, Prudential Group Insurance

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### 11. Responding to “The Ask”: The Economics of Enrollment

**JOE MITCHELL**, Assistant Vice President, Enrollment Technology and Member Services, Lincoln Financial Group; **STEVE PITZER**, Director, Workplace Voluntary Benefits, Humana, Inc.; **ARMAND WRAY**, Director, Sales Operations and Enrollment, Sun Life Financial; Moderator: **JAMIE RANICAR**, Assistant Vice President, Market Intelligence, Lincoln Financial Group

## NETWORKING BREAK — 3:30 to 3:45 p.m.

South East Foyer



# 2016 Group & Worksite Benefits Conference

**GENERAL SESSION 3** — 3:45 to 5:00 p.m.

*Grand Ballroom*

## Advisory Board Recognitions

### Value of Innovation From the Consultant's Perspective



**AMY HOLLIS**

*Voluntary Benefits Leader  
Willis Towers Watson*



**KARRIE NELSON**

*Principal, Voluntary Product Leader  
Mercer*



**PATRICIA PURDY**

*Vice President, Global Employer  
Benefits Solutions  
Pacific Resources*



**PAMELA REED, Moderator**

*Vice President Strategic Alliances  
Allstate Benefits*

**RECEPTION/DINNER** — 5:30 to 8:00 p.m.

*Sun Deck*

(All registered attendees are welcome.)

## Thursday, September 15

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

*South East Foyer*

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

*Freedom*

### 12. Sales Enablement: The Ever-Changing Dynamics of How to Make Sales Teams Successful in Our Evolving World

**JOSEPH A. ALIZIO**, Vice President, Middle Market Field Sales Development, Cigna Group Insurance; **CHUCK BROUSSEAU**, Vice President, Distribution, Prudential; **PAUL GARDNER**, Vice President, Business Optimization, Cigna; *Moderator: DAVID UNDERHILL*, Vice President Group and Individual Specialty Products, Cigna

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### 13. Rock Enrollment

**JENNIFER KISCHELL**, Vice President, Enrollment and Benefit Delivery, MetLife; **GIL MURDOCK**, Chief Revenue Officer and Principal, DirectPath; *Moderator: TINA BECKWITH, MBA*, Assistant Vice President, Marketing, MetLife

**NETWORKING BREAK** — 9:00 to 9:15 a.m.

*South East Foyer*

**CONCURRENT SESSIONS** — 9:15 to 10:15 a.m.

*Freedom*

### 14. The Financial Wellness Imperative

**BERNADETTE BAILEY**, Director, Retirement, Investment and Savings Plans, The Hartford; **JEFF BASKIN**, Executive Vice President, Financial Services, EverFi; **DAVE FLORES**, Vice President, Strategic Growth Ventures, Trustmark Insurance Company; *Moderator: DAN KRAFT*, Vice President, Product and Innovation, Trustmark Insurance Company

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### 15. Private Exchanges — A Changing Landscape

**HOWARD LAPSLEY**, Partner, Oliver Wyman; *Moderator: KAREN WHITE, PMP, FLMI*, Assistant Vice President, Health Care Exchange Solutions, Sun Life Financial

**NETWORKING BREAK** — 10:15 to 10:30 p.m.

*South East Foyer*

**GENERAL SESSION 4** — 10:30 a.m. to 12:00 noon  
Grand Ballroom

## Exhibitor Prize Drawings

### Sales Leadership Panel: How Are the Changes in the Marketplace Shaping Your Distribution Approach?



**BRADD M. CHIGNOLI**  
Senior Vice President, National Accounts  
MetLife



**GARY KIRKNER**  
President Group Sales,  
Middle Market and Select  
Cigna



**JOHN STANLEY**  
Executive Vice President of Sales  
Transamerica



**KIRK COOPER, MBA, Moderator**  
Product Leader, Voluntary  
and Exchange Solutions  
Reliance Standard Life Insurance Company

**ADJOURNMENT** — 12:00 noon

## WORKPLACE BENEFITS ADVISORY BOARD

LIMRA extends its heartfelt thank you to the members of the Workplace Benefits Advisory Board for their continued dedication to the industry, especially for their assistance in developing the content of this conference and identifying many of the presenters who will share their specialized knowledge.

### Committee Chair

**SUZAN SWEENEY, CLU, FLMI**, The Hartford

### Conference Chair

**KAREN WHITE, MBA, PMP, FLMI**, Sun Life Financial

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**ALAN MARSHALL**, Transamerica

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**PAMELA REED**, Allstate Benefits

**AARON ROBY**, Texas Life Insurance Company

**BARBARA STEWART, CFP**, Washington National

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### Staff Representative

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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.**



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