



Group Benefits Leadership Conference

*Future of Group Benefits
Through Disruptive Innovation*



2017

October 3 - 4

Radisson Admiral Hotel – Toronto Harbourfront, Toronto, Ontario

- ▼ Grasp the far-reaching impact of technology in the insurance industry
- ▼ Gain first-hand insight from senior group insurance executives
- ▼ Network with industry experts and connect with your peers

The Art of Possible With Cognitive AI



PAUL WELLMAN

*Associate Partner, Cognitive & Analytics
IBM Global Business Service*

Cognitive computing refers to next-generation information systems designed to accelerate, enhance and leverage human expertise. These systems can learn at scale, reason with purpose, and interact with humans naturally. The session will challenge attendees to explore the potential of cognitive and AI computing, demonstrate the art of the possible and understand what others are doing today across the industry. Benefits of attending include:

- Learn the fundamentals of cognitive and AI technologies and how these capabilities are being used across the insurance industry.
- Hear a number of use cases across the insurance value chain including: marketing, sales, underwriting, claims, investments, operations, and legal.
- Explore how this intelligence can remake business processes (improve efficiencies and bottom line) and elevate the client experience by better understanding their needs.

A View From the Top



JEFF MACOUN

*Executive Vice President,
Group Customer Division
The Great-West Life Assurance Company*



MARILEE MARK

*Vice President Product & Integrated Health
Solutions, Group Benefits
Sun Life*



MARK SYLVIA

*President and Chief Executive Officer
Empire Life*



RYAN WEISS, Moderator

*Assistant Vice President, Market Development
Great-West Life*

Group Insurance Executives share their insights on the main challenges, obstacles, and opportunities in the Canadian group insurance market. Attend this session to learn about what's top of mind for these leaders and what they see as the most pressing areas of focus for the industry.

Technology is Eating the World and Startups are Leading the Way



GREG DUBEJSKY
Program Manager, Advertising
Amazon

Marc Andreessen famously noted that software was eating the world. Half a decade later, we are seeing new business models emerge, powered by advances in technology, that are systematically unbundling traditionally capital intensive industries such as banking, insurance, automotive and hospitality. And the majority of this change is being driven by startups. Can corporations create the same outcomes as startups? This talk will explore and explain the mindsets, tools and methodologies that startups utilize, and highlight the stark contrasts between startups and corporates. From a case study on new approaches corporations can take, to ideation, validation, and product launches, participants will walk away with best practices for interacting with startups and a framework for how to approach learning in these times of extreme change.

Advisor Panel



SALLY HAGAN
Regional Director, Group Benefits
NFP Canada



PASCALE MAPLESTON
Partner
Align Benefits



KERI SHEPPARD
Vice President, Sales & Marketing
Johnston Group, Inc.



JAIME HUGESSEN, MBA, Moderator
Vice President, Group Distribution
Empire Life Insurance Company

Join us for a discussion with our panel of group insurance advisors. Gain perspectives on the business issues facing our distribution partners and learn how you can align more effectively with group insurance advisors. Key topics of discussions will address the following:

- What are advisors' primary responsibilities today and has this changed over time? Will the role of an advisor further evolve over time?
- What are the biggest challenges faced by an advisor/firm and how are these challenges being dealt with? What future challenges should an advisor anticipate?
- What services and support are provided by carriers to their distribution partners? Are there areas for improvement?

2017

Conference Program

◀ **TUESDAY, OCTOBER 3** ▶

REGISTRATION — 11:00 a.m. to 5:00 p.m.

LUNCH — 12:00 to 1:00 p.m.

WELCOME & OPENING REMARKS — 1:00 to 1:15 p.m.

INAH CHAMBERS

*Client Relationship Director – U.S. Client Services
LIMRA*

GENERAL SESSION 1 — 1:15 to 2:15 p.m.

The Art of Possible With Cognitive AI

PAUL WELLMAN

*Associate Partner, Cognitive & Analytics
IBM Global Business Service*

JULIE GAUDRY, Moderator
*Director, Group Life & Health
RBC Life Insurance Company*

BREAK — 2:15 to 2:30 p.m.

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

1. From Theory to Reality — Gallery Walk

You've heard all about Cognitive Computing and the use of AI, but does it seem more like a far off possibility than something concrete that you can implement to drive results? Attendees will hear from three (3) different organizations about how they are putting innovation into action in the areas of:

- Sales/marketing — knowing how to make the "next best offer"
- Advice and recommendations — automating and accelerating your advice capabilities
- Personalized and targeted recommendations and programs to encourage plan members to improve their health

ANTHONY ANTONELLO, Global Vice President, Customer Innovation & Enterprise Platform, SAP; **JULIE SERA, MSM**, Clinical Operations Manager, Best Doctors; **PAUL WELLMAN**, Associate partner, Cognitive & Analytics, IBM Global Business Service; *Moderator: JUDY BACSU, FLMI*, Director National Sales, Group Insurance, Co-operators Life Insurance Company

2. Group Benefits Fraud

Beginning with definitions of fraud and abuse, and providing case studies and statistics, our speakers will set the stage for their discussion about best practices in the investigation, detection and prevention of fraudulent claim activity, and ways in which predictive analysis can help identify suspicious claiming patterns. Session will conclude by highlighting some current trends that insurance carriers are uncovering with fraud and what might be coming next in this ever-changing field.

CHARLES DÉRAGON, Senior Consultant – Audits, Best Practices and Innovation, Desjardins Insurance; **SHEILA KARRAS**, Manager, Claims Investigations, Empire Life; *Moderator: ISABELLE BOUCHARD*, VP, Group Reinsurance, RGA Life Reinsurance Company of Canada

BREAK — 3:30 to 3:45 p.m.

GENERAL SESSION 2 — 3:45 to 5:00 p.m.

View From the Top

JEFF MACOUN

*Executive Vice President, Group Customer Division
The Great-West Life Assurance Company*

MARILEE MARK

*Vice President Market Development,
Group Benefits
Sun Life*

MARK SYLVIA

*President and Chief Executive Officer
Empire Life*

RYAN WEISS, Moderator

*Assistant Vice President, Market Development
Great West Life*

LIMRA RECEPTION/DINNER — 5:30 to 9:00 p.m.

Sponsored by:



All registered conference attendees are invited to attend reception, brewery tour, and dinner. Come and continue the networking with your peers and enjoy a fun evening of beer tasting and dinner.

Amsterdam Brew House — Located on the lake and across the street from the Radisson Admiral!

◀ WEDNESDAY, OCTOBER 4 ▶

BREAKFAST — 7:15 to 8:00 a.m.

GENERAL SESSION 3 — 8:00 to 9:00 a.m.

Technology is Eating the World and Startups are Leading the Way

GREG DUBEJSKY

*Program Manager, Advertising
Amazon*

PAUL OVCACIK, Moderator

*Director, Digital Solutions
Sun Life Financial*

BREAK — 9:00 to 9:15 a.m.

CONCURRENT SESSIONS — 9:15 to 10:30 a.m.

3. Disruption Impacts to Group Business

We've seen it happen in many other industries — disruptors who take a completely different view of how a business could/should be run, and utilize technology to radically change the industry in a short period of time. Companies like Airbnb and Uber immediately come to mind. But what about the group insurance business in Canada? Who are these companies that are promising or threatening to disrupt the group insurance business? What kinds of new solutions and approaches are they offering? Are they a threat to existing providers, or simply additional services that providers and employers will bolt onto their existing solutions? Should traditional insurers and providers of group benefits services be excited about the potential, or scared that their niche in the market is about to disappear? We will explore all these topics and more.

TIM CLARKE, *tc HEALTH CONSULTING*;

Moderator: BOB MONGIA, Vice President, Canada,
Allstate Benefits

4. The New Era of Drug Plan Management

Drug plan inflation and disease trends are driving a departure from traditional approaches to private drug plans. This session will focus on a practical discussion on what's changing and the driving forces underpinning the carrier "push strategy" to assist our clients to better balance the benefit and risk associated with drug plans.

MATTHEW GAUDRY, Manager, Group Marketing, Great-West Life Assurance Company; **KIM MACFARLANE**, AVP, Group Benefits Product, Manulife; **NED POJSKIC**, HonBsc, MSc, Ph.D., Pharmacy Strategy Leader, Green Shield Canada; *Moderator: MARTIN CHUNG*, Assistant Vice President – Strategic Health Management, Equitable Life of Canada

BREAK — 10:30 to 10:45 a.m.

GENERAL SESSION 4 — 10:45 a.m. to 12:00 p.m.

Advisor Panel

SALLY HAGAN

*Regional Director, Group Benefits
NFP Canada*

PASCALE MAPLESTON

*Partner
Align Benefits*

KERI SHEPPARD

*Vice President, Sales & Marketing
Johnston Group, Inc.*

JAIME HUGESSEN, Moderator

*Vice President, Group Distribution
Empire Life Insurance Company*

ADJOURNMENT — 12:00 p.m.

2017

Conference Details

TO REGISTER

Register Online: <http://www.limra.com/gblc>

REGISTRATION FEES

Early Registration (register by September 4)

LIMRA member: \$550 U.S. plus applicable Canadian taxes
LOMA member: \$650 U.S. plus applicable Canadian taxes
Non-Member: \$750 U.S. plus applicable Canadian taxes

Regular Registration (register AFTER September 4)

LIMRA member: \$675 U.S. plus applicable Canadian taxes
LOMA member: \$775 U.S. plus applicable Canadian taxes
Non-Member: \$875 U.S. plus applicable Canadian taxes

LIMRA requires prepayment of registration fees prior to all conferences and meetings. Please make checks payable to LIMRA in U.S. dollars drawn on a bank in the United States. For Vendor registration fees, call Events Registration at 800.235.4672 (U.S. and Canada) or 860.285.7789.

Spouses/Guests: A registration fee of \$100 is available to spouses and guests of registered attendees. Individuals in an industry-related position, co-workers, or associates do not qualify. We invite spouses/guests to participate in the event's food and social functions and ask that they wear their badge to these events. Participation in the general sessions and workshops is limited to those who have paid the full registration fee to attend the conference.

Meeting Attire: The attire for all functions of this conference is business casual.

HOTEL INFORMATION

Radisson Admiral Hotel – Toronto Harbourfront

249 Queens Quay West
Toronto ON M5J 2N5
Canada

Reservations by Phone:

+1.800.967.9033 (US/Canada Toll-free)

Make your room reservations by September 11, 2017, and mention the LIMRA Group Benefits Leadership Conference to receive the discounted group rate of \$199 single/double (plus applicable sales taxes). Requests after September 11, 2017, will be accepted on space availability. The group rate will be offered three days prior and three days after the meeting dates subject to availability of rooms at the time of your reservation. Reservations must be guaranteed with a major credit card.

GROUP BENEFITS COMMITTEE

LIMRA extends its heartfelt thank you to the members of the Group Benefits Committee 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.

JUDY BACSU, The Co-operators

DAVE BENNETT, FIA, Equitable Life of Canada

ISABELLE BOUCHARD, FCIA, FSA,
RGA Life Reinsurance Company of Canada

JULIE GAUDRY, RBC Insurance

JAIME HUGESSEN, Empire Life

RACHEL MCNEILL-THOMPSON, Sun Life Financial

BOB MONGIA, Allstate Benefits

PAUL OVCACIK, Sun Life Financial

STAFF REPRESENTATIVE

INAH CHAMBERS, LIMRA

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