



**AGENDA**  
**February 2-3, 2021**  
*All times listed are EST*

**TUESDAY, February 2**

***Pre-Conference Event!***

**Successful Enrollment – The Benefits of Digital Quoting & Policy Administration – 10:15 to 10:45 a.m.**

Join this special, pre-conference session for an interactive, moderated panel discussing where the industry is heading, including a short demo showcasing market-leading FINEOS solutions. There will be an opportunity to join in an open discussion and ask the panelists your questions.

**Welcome and Opening Remarks – 11:00 to 11:10 a.m.**

**InAh Chambers**, Director, Member Relations & Sales  
Workplace Benefits  
LIMRA

**General Session 1 – 11:10 a.m. to 12:00 p.m.**

**2020 - A Year in Review**

2020 was a year like no other in recent history. The industry has faced acute and macro-level challenges. This session will recap how the year unfolded and its impact to the ancillary insurance and ben tech industries and some of the innovative ways they have responded.

**JENNON CARUTH**, Co-Founder and Principal  
Clarity Enrollment Solutions, LLC

**RICK JOHNSTONE**, Vice President of Employee Benefit Sales  
The Standard

**DAYNA KIRK**, VP, Head of Customer Service  
The Standard

**BRADLEY TAYLOR**, EVP, Strategic Partnerships  
PlanSource

**KEITH FEIST**, Benefits Technology Consultant (Moderator)  
The Standard

**Break – 12:00 to 12:30 p.m.**

**Sponsored by AdminaHealth®**

**Premium Billing Transformation – Are You Ready?** Join the fun for a “Do You Need a License to Bill” BINGO game (Gift Card for winners!) along with a Hot Topics discussion on Premium Billing Transformation.

**Concurrent Sessions: 12:30 to 1:15 p.m.**

**Session 1: Discover, Conditions and Goals, OH MY!**

Join this session to walk through real life case studies of “good” and “bad” enrollments. Learn more about considerations for case discovery. See how conditions can drive participation. Understand how carriers and HR tech can work together better to engage and drive better benefit engagement.

**COLIN BRADLEY**, President and CEO, Winston Benefits; **SARAH OLIVER**, Second Vice President of Enrollment, Guardian Life Insurance Company; **Moderator: ROBYN FEARS, GBDS**, Senior Enrollment Operations Manager, Guardian Life Insurance Company

**Session 2: The Ultimate Debate: Who is the System of Record?**

What does it mean to be the system of record? Who is the system of record? Join us in a debate style panel of industry experts to hear from all view points and cast your vote to help us settle the age old debate once and for all.

**JIM BRADY**, Director, Benefit Administrator, AssuredPartners; **TOM DAVENPORT**, Senior Director, Product Development, USAble Life; **RUTHIE GRAY**, Vice President, Product Development, Selerix; **TED PHILLIPS**, Director, Distribution Digital Center of Excellence, Sun Life; **Moderator: JENNIFER PIERCE**, Benefit Technology Partner Management, Lincoln Financial Group.

**Break – 1:15 to 1:45 p.m.**

**Join us for a Current Event Polling Activity hosted by Virtual Benefits Administrator (VBA) for a chance to win prizes and a lively conversation on current events.**

**Concurrent Sessions: 1:45 to 2:30 p.m.**

**Session 3: Decision Support: The Insight Employees Are Craving**

Decision support tools have come a long way since they were first introduced to the market, and they continue to evolve. Employees are looking for insight and want to understand all the benefit options available to them, and more importantly feel confident in their decisions. We will be discussing decision support tools and philosophy with industry leaders in the space to understand how decision support is evolving and where it’s heading.

**SHERRI BOCKHORST**, SVP Innovation and Strategy, Businessolver; **SINA CHEHRAZI**, Co-Founder and CEO, Nayya; **TAMMY KAPLAN**, Product Manager, Empyrean; **SHELBY GEORGE**, CEO, PERKY; **Moderator: SARAH MAXWELL**, Broker Technology Executive, Aflac

## **Session 4: Driving Engagement in a Virtual Environment**

Market demand for virtual engagement and enrollment solutions has increased as employers and brokers look for alternative ways to educate and engage employees during the pandemic. Many companies have embraced virtual benefit counselors, virtual benefit fairs and other creative methods to reach employees. This interactive session will explore virtual engagement trends, how employers and customers are responding to these methods, business operational and implementation considerations and how we can partner to design engagement strategies that drive customer sales/retention and deliver a positive client and customer experience.

**MIKE EHRLE**, Practice Leader, Alight Benefits Guidance; **KELLY HARBOUR**, Sales Operations Manager, Benefit & Exchange Technology Solutions, Cigna; **MARC JEFFREYS**, Vice President, Business Operations, Cigna; **WAYNE WATKINS, Jr.**, National Development Manager, SMBO (See My Benefits Online) – A Keeler & Associates Company; **Moderator: SCOTT JOHNSON**, Director, Benefit Exchange & Technology Solutions, Cigna.

**Break – 2:30 to 3:00 p.m.**

## **General Session 2 – 3:00 to 4:00 p.m.**

### **LDEX: The Past, The Present, and The Future**

Join us as carriers and Benefit Administration partners have a panel discussion on the LIMRA LDEX standard. After a brief presentation on LDEX Benefits Enrollment Management Standard 1.1 including the current and future state, our panelists will provide insight on the implementation of the LDEX standard and how it was utilized during the recent open enrollment season.

**KELLIE BENSON-BRAY**, Director, Strategic Partner Development, NAS  
ADP

**Mark Kozielec**, Director of Institutional Client Data  
Prudential

**RACHEL LYUBOVITZKY**, CEO  
EverythingBenefits

**KAREN SULLER**, Technology Relationship Executive  
The Hartford

**CARRIE (HARPER) PENMAN**, Business Analyst, Workplace Integrations (Moderator)  
Transamerica

## WEDNESDAY, February 3

### General Session 3: 11:00 a.m. to 12:00 p.m.

#### Acronym Soup – The (not so) secret recipe to successful API Integrations

APIs are the wave of the future. How does your organization need to position itself to build the most successful API integrations?

- Industry Pulse Check – How are we doing, where will we go from here?
- Navigating the Complexities of API Integrations
- What problems won't APIs Address?

**BRYCE DENEEN**, Director, Product Management  
Plansource Benefits Administration Inc.

**ANDY MOORE**, Director, API Program and Digital Partnerships  
Guardian Life Insurance

**ANURAG YAGNIK**, Chief Technology Officer  
Vitech Systems Group Inc.

**KEEGAN TIERNAN**, Director of Benefit Technology Partnerships (Moderator)  
Mutual of Omaha

### Break – 12:00 to 12:30 p.m.

#### *Sponsored by Vitech*

*Join in on an interactive game of "Guess Who: The World of Insurance Edition" to compete with your fellow attendees for a chance to win \$50 Amazon gift cards!*

### Concurrent Sessions: 12:30 to 1:30 p.m.

#### Session 5: Lessons Learned from COVID Environment

Join this panel discussion on the lessons learned during the COVID-19 pandemic. Discussion will focus on what best practices we can leverage, as an industry, moving forward.

**CORA HALL**, AVP Marketing, The Hartford; **HEATHER GARBERS**, VP Voluntary Benefits, HUB International; **STEVE OLIVAS**, VP Marketing, Selerix; **REBECCA WOOLSEY**, HR Manager, Fullsteam;  
**Moderator: PETER KELLY**, Assistant Director, Partnership Strategy & Development, The Hartford

#### Session 6: Benefits Technology & Carrier Partnerships – Outside Looking In

Interested in hearing more about how the market has shifted perceptions of Ben Tech & Carrier Partnerships? Join this session to hear perspectives from a unique, outside viewpoint!

- Learn about key themes from a broker, employer and technology perspective
- Begin thinking about how you can evolve your partnership strategy
- An opportunity to ask questions of the panel to learn more

**ANNE BURKETT**, National Practice Leader, HR Technology, USI Insurance; **KATE TAYLOR**, President and COO, Benefit Technology Resources; **Moderator: CASSANDRA SCHMIDT**, Vice President, Platform Relationships & Integrations, Prudential

**Break – 1:30 to 2:00 p.m.**

**General Session 4 - 2:00 to 2:45 p.m.**

**Data Quality: Partnering for Successful Outcomes**

During this session we will explore perspectives on data quality relative to transmissions from ben tech to carrier and carrier to ben tech.

**EDDIE CHOI**, Director, Solutions Architecture  
Noyo

**ALAN INGLEY**, VP, Enrollment & Technology Services  
Wellfleet

**BETINA MUSSER**, Product Manager, Data Exchange and Platform  
BenefitFocus

**LUKE SLADICKA**, Assistant Vice President,  
MetLife

**NICOLE LAUGHRIDGE**, Director, Third Party Activation and Development (Moderator)  
MetLife

**Break – 2:45 to 3:15 p.m.**

**General Session 5 – 3:15 to 4:00 p.m.**

**A View Into InsurTech 2021 and Beyond**

As an industry Group/Worksite carriers have been slower in adapting emerging technologies. We'll talk to some experts to hear what is on the horizon and why insurance carriers are now starting to take notice. Join us as we hear about how new startups emerge and become mainstream. What are carriers looking for as they survey the landscape of startups. Has the pandemic pushed the industry to finally embrace technology at a faster pace than ever before?

**MOHAMMED DASTIGIR**, Head of Fintech & HealthTech Partnerships, Ecosystem Development  
MassMutual

**SIMON PHIPPS**, Founder  
The Digital Insurer /TDI

**BHARAT RAJARAM**, Vice President, Managing Director & CFO  
Aflac Global Ventures

**KARTIK SAKTHIVEL**, Vice President & Chief Information Officer  
LIMRA

**BRANDON COOK**, Director, Enrollment & Onboarding (Moderator)  
Prudential

**Closing Comments/Adjournment – 4:00 to 4:15 p.m.**

**InAh Chambers**, Director, Member Relations & Sales  
Workplace Benefits  
LIMRA