



Keynote Sessions

Our Time to Thrive

David Levenson, DBA, FSA, CFA, *President and Chief Executive Officer, LIMRA and LOMA*

A Conversation With Former First Lady Michelle Obama

First Lady of the United States from 2009 to 2017

First Lady Michelle Obama in a moderated conversation with
Carolyn Feeney, CEO, U.S. Insurance & Retirement Businesses for Prudential Financial, Inc.

Growth in the New World

Jonah Berger, *Wharton Professor; World-Renowned Expert on Innovation and Change; Best-selling Author*

Our world has recently undergone unprecedented change at a rapid pace.

As we return to a new normal, smart companies and industries are recognizing the opportunity for continued growth. How can you get your organization on the right track and focused to take advantage of these emerging opportunities?

Berger will discuss the changes in consumer and customer behavior that have occurred so far, which pandemic-driven trends are here to stay, and how to thrive in this new reality.

When Crisis is Constant: Living & Leading in a High Velocity World

Joseph Coughlin, *Founder and Director MIT Age Lab*

The pandemic has affected every aspect of life and nearly every industry. However, even before COVID, war, and inflation a constant state of crisis has been characterizing the context of life and decision-making. Moreover, each crisis serves as a propellant, accelerating change at an unprecedented rate. How does this high velocity world affect us physiologically, influence our decision-making, and ultimately, how are crises accelerating a societal rethinking of once unquestioned ideas underpinning work, life, and life stage?

Economic Update

Austan Goolsbee, *Chairman, President's Council of Economic Advisers (2010–2011) and Professor of Economics, University of Chicago Booth School of Business*

Christina Romer, *Chair, Council of Economic Advisers (2009–2010) and Professor of Economics, University of California, Berkeley and Contributing Editor, Bloomberg News*

Together, these economic leaders will thoughtfully examine the industries, groups and geographies that will be doing better or worse this year and beyond — and what this means for future elections and policy outcomes. Taxes, trade, energy, and monetary policies are all at stake and this duo will discuss just what this means moving forward.

Senior Executive Panel

Bryan Adams, *Co-Founder and Chief Executive Officer, Integrity Marketing Group*
Ellen Cooper, *President and Chief Executive Officer, Lincoln Financial Group*
Gilles Dellaert, *Global Head, Blackstone Insurance Solutions*
Jennifer Fitzgerald, *Co-Founder and Chief Executive Officer, PolicyGenius*
Mary Jane Fortin, *Moderator, Executive Vice President and Chief Commercial Officer, Thrivent*

The panel will provide their unique insights on the impact of inflation and rising interest rates on growth, the expanding market share of private equity, the consequences of COVID-19, and the challenges of a very competitive talent market.

Life Track Sessions:

Brokerage Consolidation — What's the End Game?

Farron Blanc, *Vice President, Brokerage Distribution, Legal & General America*
Bruce Donaldson, *President and Chief Executive Officer, Simplicity*
Tim Mastel, *Partner, Simplicity*
Kelly Fehring, FLMI, ACS, CLU, Moderator, *Member Relations Director, LIMRA and LOMA*

In this session, we'll explore the growing trend of insurtechs buying BGAs that is accelerating consolidation in the life insurance space. We'll hear from leaders driving some of the decisions being made in the distribution landscape and gain their insights on what is motivating these transactions — getting a glimpse into the future through their lenses and what it means for our industry.

Product Possibilities in a Post-Covid World

Shelly Habecker, Ph.D., *Strategy and Innovation Manager, Swiss Re*
Francis Radnoti, FSA, MAAA, *Senior Vice President, Chief Product Officer, Protective Life*
Parag Shah, FSA, MAAA, *Vice President, Product Design, Pacific Life*
Chuck Bremer, FSA, MAAA, Moderator, *Vice President, Product Development – Life, Nationwide*

As the pandemic subsides, life policy sales are declining, and the heightened consumer demand is diminishing — despite the continued need to protect families and loved ones. How do we sustain awareness and interest in the importance of life insurance, without a pandemic to drive them? Beyond the motivation to buy, how do we make life insurance products available, accessible, and affordable for everyone who needs it?

From Digital Enablement to Empowerment

Kelly Coomer, *Chief Information Officer, Sammons Financial Group*
Melbourne O'Banion, *Chief Executive Officer, Bestow Life*
Robert McIsaac, FLMI, LLIF, *Head of Life, Annuities and Benefits, Aite-Novarica Group*
Kartik Sakthivel, Moderator, *Vice President and Chief Information Officer, LIMRA and LOMA*

The COVID-19 pandemic accelerated digital transformations across our industry that have evolved into a “Digital Reset.” Digital will define this decade across our industry. Those that harness its full potential will be able to capitalize on the new and unprecedented opportunities. But where does one start in this vast digital universe? Join this panel of experts for an engaging discussion on what carriers need to get right and where they need to focus during the “Roaring Digital Twenties.”

Designing the Life Insurance Company of the Future

Becky Kennedy, *SVP & Chief Operations Officer, Everlake Life*
Jeffrey Pattison, *Vice President – Platforms and Engineering Domains, Sun Life Canada*
Mercedes Concepcion-Gray, *Head of Growth and Innovation, NTT DATA*
Kartik Sakhivel, *Vice President & Chief Information Officer, LIMRA and LOMA*

The future of insurance will be unrecognizable. Envision a future where insurers use advanced technologies to delight customers, including embedded financial services and insurance products, digital platforms and ecosystems, new distribution models, predictive analytics, and rich virtual interactions in the metaverse — all with human touch options. Join our panel of experts as they discuss the top industry pain points, share current strategies, and imagine the possibilities for the next generation of insurance.

Annuities Track Sessions:

Defining Success for Today's Retirees

Glen Franklin, *Director of Customer Research, Jackson*
Bryan Hodgens, CRC, AIF, Moderator, *Corporate Vice President, Head of Distribution Research & Annuity Research, LIMRA and LOMA*

This session will look at the latest LIMRA research for pre-retirees and retirees and their sentiments about retirement spending with today's market challenges and how annuities affect their financial planning. Jackson National will share insights into the retirement mindset and how income planning has evolved from Monte Carlo analysis to the client's perception of retirement plan success.

Avoiding Digital Overload: A Meaningful Advisor Experience

Jay Charles, *Director of Annuity Products, LUMA Financial*
Brent Mondoskin, *Chief Platform Officer, FIDx*
Scott Stolz, *Managing Director, iCapital*
Bryan Hodgens, CRC, AIF, Moderator, *Corporate Vice President, Head of Distribution Research & Annuity Research, LIMRA and LOMA*

Digital technology is rapidly evolving. To stay relevant insurance carriers must adapt to the way advisors want to do business. How are annuity platforms leveraging technology to marry digital and human interaction? How are they creating efficiencies that effectively reshape the advisor and consumer experience? Join this panel of industry experts for a discussion on these topics and more.

In-Plan Annuities: The Massive Opportunity That Isn't Happening

Jerry Patterson, *President, Fidelity Life*
Dave Paulsen, *Chief Distribution Officer, Annexus*
Tamiko Toland, *Managing Director, TIAA*
Bryan Hodgens, CRC, AIF, Moderator, *Corporate Vice President, Head of Distribution Research & Annuity Research, LIMRA and LOMA*

In-plan annuities are not new to defined contribution plans, but an emerging generation of products is creating buzz. This panel of industry experts will explore these innovative product designs, challenges the industry faces to gain acceptance, and what steps are being taken to include these solutions in a retirement plan.

Workplace Benefits Track Sessions:

Workplace Benefits Crossroads: The Convergence of Health, Wealth

Matthew Bahl, *Vice President, Head of Workplace Financial Health, Financial Health Network*

Juneen Belknap, *Partner, PwC*

Mark Devine, *Vice President, Head of Disability, Prudential Financial*

Rob Grubka, *Moderator, Chief Executive Officer, Health Solutions, Voya Financial*

Flexible and innovative benefits are a key component of an employer's value proposition in the war for talent. A customized program transcends simply offering a collection of benefits, and seeks to address employees' overall financial, physical, and emotional well-being. Offering those benefits in an integrated and holistic package can increase both value and the confidence employees have that they're making good decisions. Workplace benefits carriers can learn from behavioral economics and the power of defaults to improve benefits delivery and increase use and effectiveness while controlling costs.

The Critical Value of Voluntary Benefits

Sharon Broadway, *Executive Vice President, Partnerships and Corporate Strategy, Corestream*

Lisa Lent, *Service Executive, Carrier Implementation, Service and Strategic Partnerships, ADP Workforce Now*

Jillian Mondaca, *Assistant Vice President, Digital Technology Partner Strategy and Management, Unum*

Jeffrey Morgan, *Sales Director, Voluntary Benefits, Group Insurance, Prudential*

Dan Murdoch, *Chief Marketing Officer, Nayya*

Tim O'Connor, *Assistant Vice President, Partner Integration, Voya*

Nathan Petersen, *Southeast Voluntary Practice Lead, The Standard*

Sarah Oliver, *Moderator, Vice President, Head of Voluntary Products, Prudential*

The new hybrid world of work has made it more challenging to educate employees on the value of the coverage offered. Employers, carriers, brokers, and benefits administration providers all offer education and engagement capabilities. Join us for a discussion about how each entity can optimize its place in the benefits ecosystem while engaging and educating employees to enroll in the benefits that provide the protection they need.

Don't Get Left Behind: The Latest on Leave Management

Megan G. Holstein, *Vice President, Head of Absence Management, Group Benefits, The Hartford*

Lana L. Rupprecht, *Director, Product Compliance, Matrix Absense Management*

Lori Welty, *Senior Product Compliance Attorney, Fineos*

There's no doubt that leave management is a growing yet complex arena. With increasing demands for flexible work arrangements, employer focus on comprehensive employee wellness, and a complex landscape of regulations, products, and technologies, it can be tough to stay up-to-speed on this ever-evolving space. Join us in this informative session as we explore the latest trends, advancements, and outlook on the paid family and medical leave landscape.