

2025 WORKPLACE
BENEFITS CONFERENCE

Pathways to Growth

Helping Our Members in Workplace Benefits Navigate With Confidence

Future Pathways: Strengthening Workplace Benefits Together

2024 LIMRA and LOMA Member Survey Results

Empowering Our Workplace Benefits Members through:

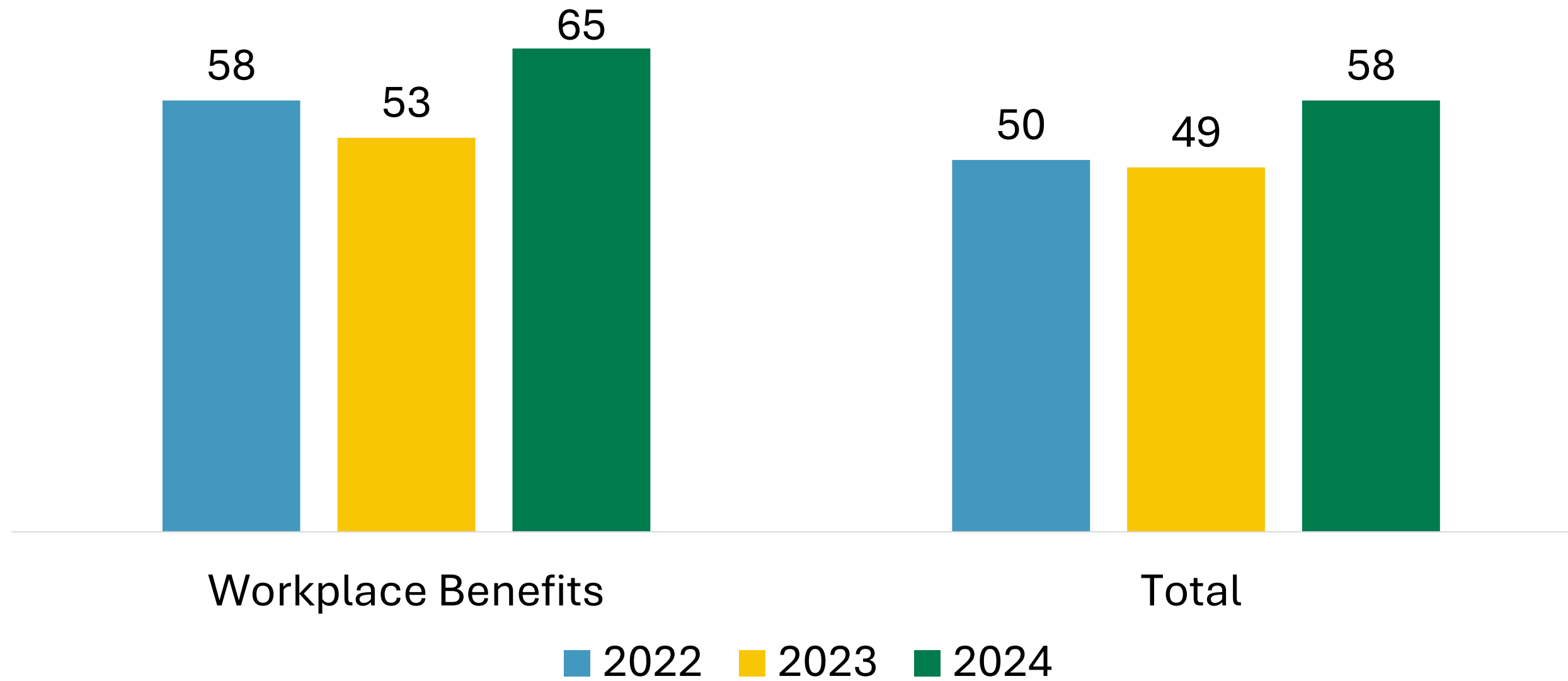
- Knowledge
- Insights
- Connections
- Solutions

Workplace Benefits Focus in 2025

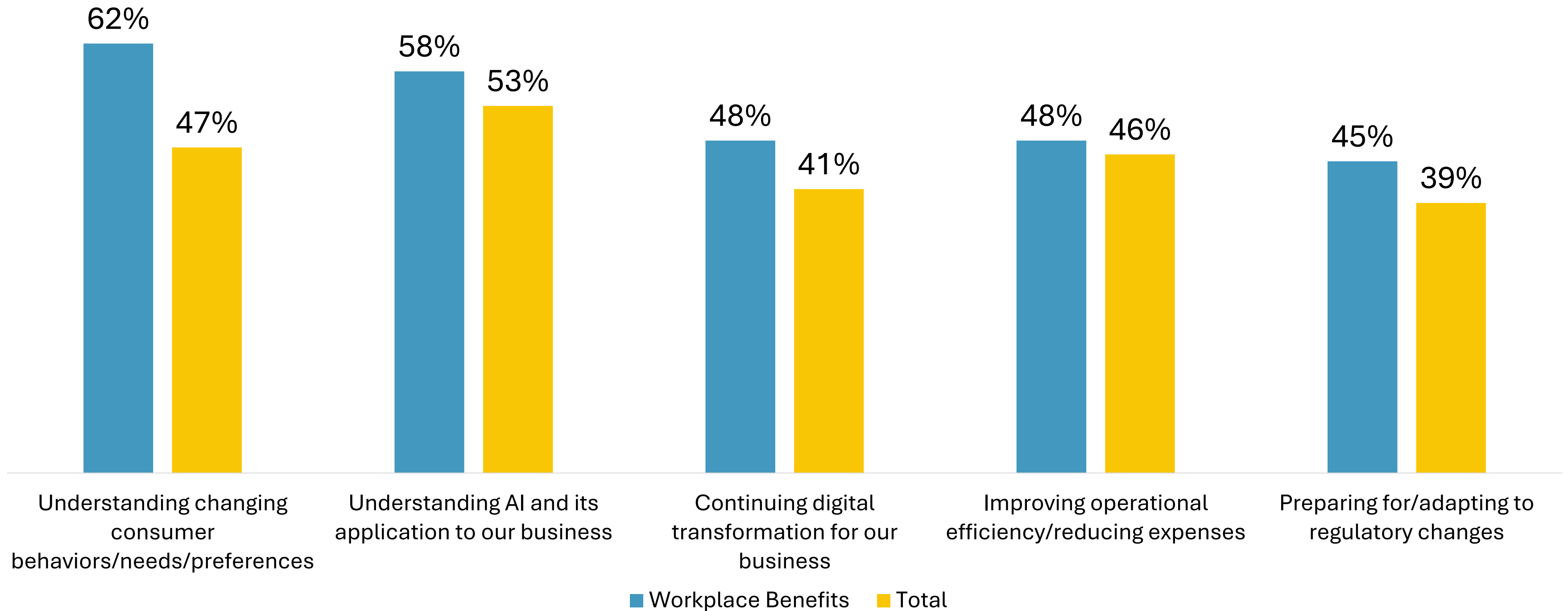


2024 LIMRA and LOMA Member Survey Results

Net Promoter Score



Objective: Impacting Focus in 2025



#Selecting: Expanding/strengthening distribution relationships (n=380), Evaluating new markets and market opportunities (n=479), Developing/introducing new products (n=465), Understanding changing consumer behaviors/needs/preferences (n=693), Continuing digital transformation for our business (n=609), Understanding AI and its application to our business (n=782), Improving operational efficiency/reducing expenses (n=684), Preparing for/adapting to regulatory changes (n=571), Attracting and developing new talent/reskilling existing talent (n=517), Other, please specify (n=17), None of the above (n=66).

Empowering Our Workplace Benefits Members

Empowering Our Members

**Advancing the
financial services industry
by empowering our members with:**

KNOWLEDGE



INSIGHTS



CONNECTIONS



SOLUTIONS



Knowledge



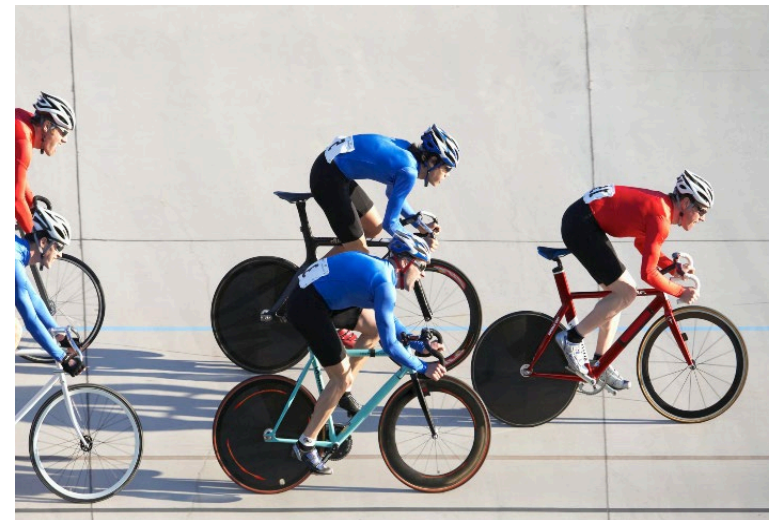
**Complete Insurance
Fundamentals**



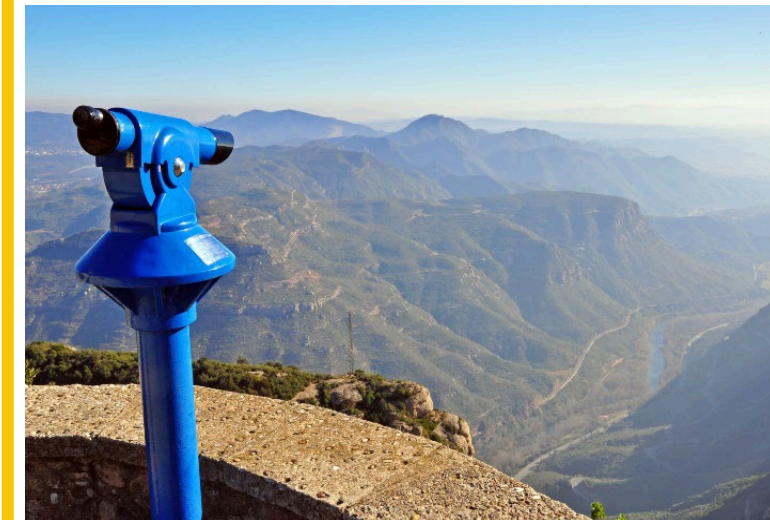
Industry Advantage



Insurance Immersion



Executive Immersion



**Strategic Leadership
Experience**

Insights



Compass Program



**Product Benchmarks
and Research**



**Consumer Benchmarks
and Research**



**Distribution Benchmarks
and Research**



SOA Research + LIMRA
INSTITUTE *Navigate With Confidence*

Experience Studies Pro



ACLI Finseca LIDMA Life Happens LIMRA LOMA MDRT NAIFA NAILBA

Thought Leadership



**McKinsey LIMRA 360
Performance Benchmarking
Survey**

Connections



Conferences



Executive Advisory Boards



CxO Groups



Webinars



Study Groups



Committees

Connections: Member Collaboration Groups

Study Groups:

Account Management Study Group
Defined Contribution Income Strategies Roundtable
Dental Study Group
Enrollment Technology Study Group
Leave Management Strategy Study Group
Not-for-Profit Study Group
Retirement Plans Study Group
Voluntary Benefits Study Group
Voluntary/Worksite Benefits Regulatory and Compliance Study Group
Workplace Benefits Competitive Intelligence Study Group

Committees:

Data Exchange Standards Committee
LOMA Employee Benefits Administration Committee
Pension Risk Transfer Committee
Supplemental Health, DI, and LTC Committee
Workplace Benefits Program Committee
Diverse Markets Committee
Retirement Plans Committee

Solutions



FraudShare



Hiring Assessments



**Anti-Money Laundering
Training**



**Compensation Resource
Center**



LDEx Standards



Trustworthy Selling



Applied Research Solutions



Customer Assurance Program

Workplace Benefits Focus in 2025

Workplace Benefits Focus in 2025

Increase integration of the Workplace Benefits industry within the Association

Expand Workplace Benefits offerings within **Industry Advantage, education, and talent solutions**

Sharpen the focus on the **broker's voice** to the Association

Publish key research pieces such as the **Institutional Retirement Reference Guide**

Complete the **Group LTD Claim Incidence Experience Study** in partnership with the Society of Actuaries

Continue the multiyear effort to **launch** the **Workplace Benefits Compass program**

Launch pilot of the Workplace Benefits **Transactional Data and Analysis Program (TDAP)**

Expand the **LDEx Program** into **Canada**

We Want to Hear From You! Please Leave a Rating and Review.



Module Option

2025 Workplace Benefits Co...

Event Feed

Agenda

Community Engagement

Conference Resources

Speakers

Attendees

Exhibitors

Sponsors

Ratings & Reviews

Leaderboard

May-

Reg

10:00

Gen

02:00

Sea

GS1

02:30

Dur

Bre

03:30

1.1

03:45

Jav

1.2

03:45

Nat

1.3

03:45

Del

Agenda Option

Detail

General Session - Workplace Benefits Industry Overview

April-23-2025 02:00 PM-02:30 PM

(no ratings yet)

Sean O' Donnell, LLIF

Location

Session Chat

Add To Calendar



Thank You



Navigate With Confidence