

# 2025

## CONFERENCE

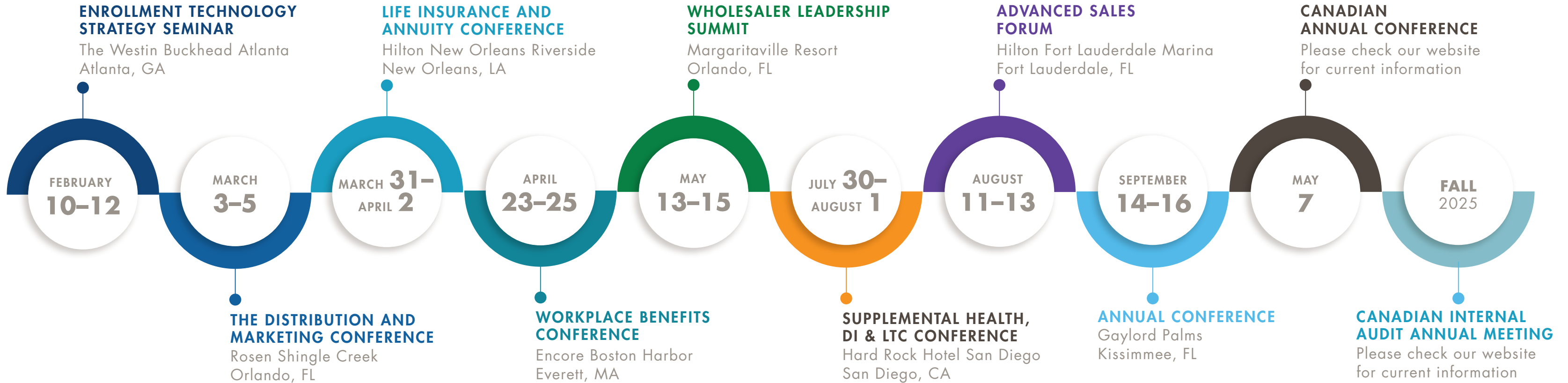
S E R I E S

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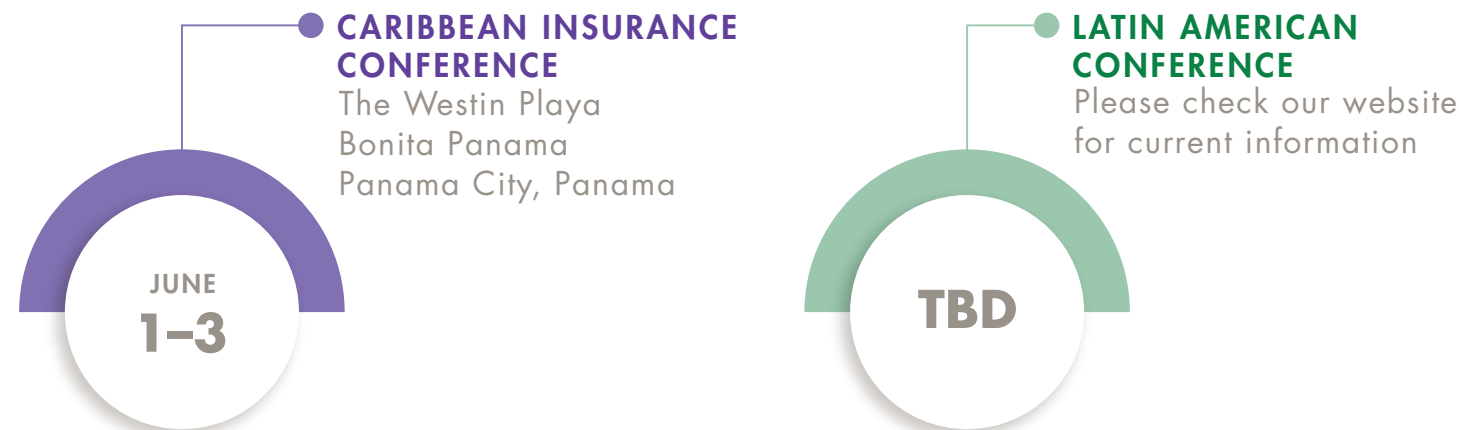


# 2025 CONFERENCES AT A GLANCE

## 2025 CONFERENCE SERIES U.S. AND CANADA



## 2025 CONFERENCE SERIES INTERNATIONAL



To register or for more information, contact:  
 LIMRA's Customer Service Department  
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For information on sponsoring and exhibiting, contact:  
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FEBRUARY  
10-12

The Westin  
Buckhead Atlanta  
Atlanta, GA

### ● ENROLLMENT TECHNOLOGY STRATEGY SEMINAR

**WHO ATTENDS?** Individuals who lead workplace benefits initiatives, enrollment strategy or solutions, vendor and/or or exchange management, enrollment and/or benefit administration technology. All participants should be highly experienced in their fields.

**HIGHLIGHTS:** This is an opportunity for LIMRA and LOMA member insurance companies, enrollment and benefits administration technology providers, and brokers to participate in an open forum on how to work together cohesively and define better outcomes within the enrollment technology ecosystem. Our goal is to connect participants with peers and technology purveyors to learn, network, and share innovative ideas to help advance and reshape benefits enrollment and administration, including industry-driven data exchange standards.

MARCH  
3-5

Rosen Shingle Creek  
Orlando, FL

### ● THE DISTRIBUTION AND MARKETING CONFERENCE

**WHO ATTENDS?** Life insurance and annuity distribution and marketing professionals involved in channel growth, productivity, and reshaping distribution and marketing for success. Attendees include heads of distribution, sales, recruiting, compensation, distribution finance, training, marketing, and product development.

**HIGHLIGHTS:** This conference brings you the latest information from industry experts, business thought leaders, and top-notch distribution and marketing professionals. The conference will provide a forum to discuss opportunities that accelerate the marketing and sales funnel while closing the coverage gap in the market. Enjoy unsurpassed networking and the freedom to attend any of the sessions in these key focus areas: agency building, brokerage, independent, multi-line, and financial management. In addition, we've enhanced our program content with sessions specific to marketing and annuity distribution.

MARCH 31-  
APRIL 2

Hilton New Orleans  
Riverside  
New Orleans, LA

### ● LIFE INSURANCE AND ANNUITY CONFERENCE

**WHO ATTENDS?** Executives and professionals involved in the development, operations, marketing, distribution, technology, compliance, fraud prevention, or administration of life insurance and annuity products.

**HIGHLIGHTS:** Jointly hosted by the ACLI, LIMRA and LOMA, and the Society of Actuaries, this premier conference provides life insurance and annuity professionals with rich cross-functional learning and networking opportunities around the development, operations, marketing, distribution, regulation, technology, and administration of individual life insurance and annuity products, as well as a robust fraud prevention, financial crimes and compliance track. The cross-functional nature of the event provides the opportunity to learn from and interact with those in other disciplines as well as your own. The Life Insurance and Annuity Conference will cover the important issues and identify strategies that will shape the industry's future. No other conference can offer you the depth and breadth of information that you'll find here.

APRIL  
23-25

Encore Boston Harbor  
Everett, MA

### ● WORKPLACE BENEFITS CONFERENCE

**WHO ATTENDS?** Executives and professionals responsible for the development, marketing, and distribution of group and workplace/voluntary benefits, including life, institutional retirement, disability, critical illness, accident, and other supplemental health products, dental, vision, and healthcare plans.

**HIGHLIGHTS:** This industry-leading conference examines the workplace benefits marketplace from the carrier, employer, employee, distributor, and benefit technology perspectives with cross-functional learning and networking opportunities. Participants will gain fresh ideas and insights to successfully address the transformational changes impacting the workplace benefits marketplace.

2025  
CONFERENCE SERIES  
U.S. AND CANADA



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**2025**  
**CONFERENCE SERIES**  
**U.S. AND CANADA**

MAY  
13-15

Margaritaville Resort  
Orlando, FL

### ● WHOLESALER LEADERSHIP SUMMIT

**WHO ATTENDS?** Individuals from LIMRA and LOMA member companies who lead external, hybrid, and/or internal wholesaler teams. Team leads are not eligible; you must supervise an entire sales desk team to qualify. Seating is limited.

**HIGHLIGHTS:** This one-of-a-kind event is uniquely designed to connect participants with peers and actionable solutions. The highly interactive format blends open discussion and dynamic presentations from thought leaders with plenty of opportunities to network, exchange ideas, meet new people, connect with peers, and more.

JULY 30-  
AUGUST 1

Hard Rock Hotel  
San Diego  
San Diego, CA

### ● SUPPLEMENTAL HEALTH, DI & LTC CONFERENCE

**WHO ATTENDS?** Professionals responsible for actuarial/product development, underwriting, claims, regulation/product filing, and/or administration of the following products (through either worksite or retail channels): accident insurance, critical illness insurance, hospital indemnity plans, and individual disability insurance or long-term care/combination products.

**HIGHLIGHTS:** Network with your peers and leading industry experts while gaining insight into the latest trends in supplemental health products — accident insurance, critical illness, and hospital indemnity — as well as individual disability insurance and long-term care/combination products. The cross-functional nature of this event provides the opportunity to interact with — and learn from — peer professionals in other disciplines as well as your own. With over 20 workshops and multiple general sessions, the Supplemental Health, DI, & LTC Conference will cover the important issues and identify strategies that will shape the industry's future. The conference provides a unique depth and breadth of relevant information, only to be found here.

AUGUST  
11-13

Hilton Fort Lauderdale  
Marina  
Fort Lauderdale, FL

### ● ADVANCED SALES FORUM

**WHO ATTENDS?** Advanced sales and marketing executives, estate and business planning specialists with carriers, distributors, BGAs and IMOs, CMOs, and sales officers with accountability for serving individual markets.

**HIGHLIGHTS:** Created by advanced sales professionals, the Forum provides advice from industry leaders with unique expertise in this segment of the financial services market. This is the only event of its kind — dedicated to improving the practice of advanced sales. Whether you are struggling to do more with less or experiencing the challenges of organizational change, attending the Forum will give you unparalleled insights from peers and actionable ideas from experts.

SEPTEMBER  
14-16

Gaylord Palms,  
Kissimmee, FL

### ● ANNUAL CONFERENCE

**WHO ATTENDS?** The LIMRA Annual Conference is one of the largest gatherings of executives representing diverse sectors of the financial services industry, including life, annuities, and workplace benefits. Our members and partners come together for strategic industry insights and high-level networking — a must-attend for executives.

**HIGHLIGHTS:** As the industry's premier event, the LIMRA Annual Conference is recognized for the caliber of its keynote speakers and the quality of thought leadership. It offers an unparalleled forum where top leaders and executives gather to discuss the latest issues and trends facing the financial services industry today. Leave with actionable ideas and strategies that will set the direction and drive the future success of our industry.

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## 2025 CONFERENCE SERIES U.S. AND CANADA

MAY  
7

### CANADIAN ANNUAL CONFERENCE

**WHO ATTENDS?** The LIMRA and LOMA Canada Annual Conference is a key event that draws senior executives and leaders across diverse sectors of the financial services industry and other related business segments who want to be engaged in important conversations with their industry peers and other experts.

**HIGHLIGHTS:** With unprecedented change happening all around us, what's the new normal and next normal? The LIMRA and LOMA Canada Annual Conference offers fresh perspectives, inspiring ideas and actionable insights on strategic topics presented by visionary thought leaders and pundits. Come away with knowledge on how to thrive in disruption, differentiate from the crowd, and win with your customers — all presented from a distinctly Canadian perspective.

BMO  
Toronto

FALL  
2025

### CANADIAN INTERNAL AUDIT ANNUAL MEETING

**WHO ATTENDS?** Mid-to-senior level business professionals in audit, accounting, compliance, risk management, and other related disciplines who seek fresh learning and valuable networking opportunities with industry pundits and like-minded peers will benefit from attending this event.

**HIGHLIGHTS:** Participants convene to gain relevant and timely information on hot button issues and to keep on point with evolving audit trends, best practices, and tools. (This event is eligible for CE credits.)

Please check our website for current information

## 2025 CONFERENCE SERIES INTERNATIONAL

JUNE  
1-3

### CARIBBEAN INSURANCE CONFERENCE

**WHO ATTENDS?** Over 500 delegates from 38 different countries from the insurance, financial, and business sectors, interested in conducting business throughout the Caribbean. Attendees include senior level executives, administration executives, heads of marketing, distribution, and information technology, along with top regional producers.

**HIGHLIGHTS:** The annual Caribbean Insurance Conference, renowned as the premier conference for professionals in the insurance industry, provides an information-sharing and collaborative forum for Caribbean insurance regulatory authorities, insurance educational institutes, actuaries, and other special groups with interest in the insurance industry in the Caribbean.

The Westin Playa Bonita  
Panama City, Panama

TBD

### LATIN AMERICAN CONFERENCE

**WHO ATTENDS?** Head office executives as well as agents and advisors conducting business in Latin America.

**HIGHLIGHTS:** Join other insurance leaders and executives from throughout Latin America for the region's annual flagship event discussing new strategies, technologies, and best practices for growth opportunities within existing and potential sales channels. Attendees will hear from industry experts on emerging trends and developments in marketing, distribution, and corporate management, as well as economic and regulatory issues that will impact future business in the region.

Please check our website for current information



## 2025 LIC CONFERENCE SERIES



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February 4-7  
[WWW.LOMA.ORG/LIC2025](http://WWW.LOMA.ORG/LIC2025)  
Hyatt Regency Clearwater Beach  
Resort & Spa

### 2025 LIC ANNUAL CONFERENCE Navigating Change Together



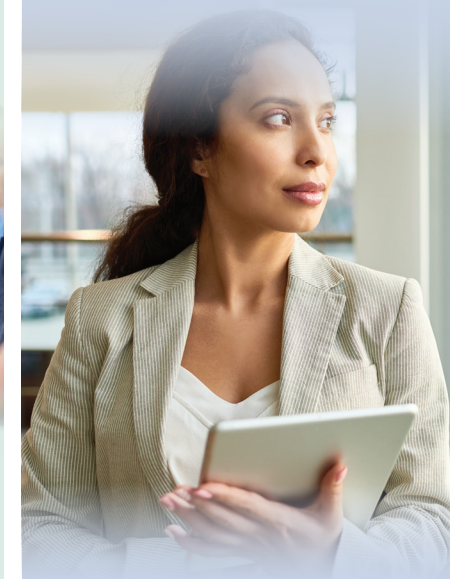
**WHO ATTENDS?** Senior-level executives from small-to-midsize life insurance companies interested in networking, education, and interactive discussions on common challenges and innovative solutions.

**HIGHLIGHTS:** At every level of each company, we're focusing on new technology, new consumer expectations and needs, and new ways of doing business. We don't need to address all this change in a vacuum — by coming together with top executives from similar small-to-midsize life companies, we can all benefit from our shared knowledge and experience. The conference will feature thought-provoking expert presenters, case studies, facilitated discussion, and networking opportunities.



TBD  
[WWW.LOMA.ORG/FINALEXPENSE](http://WWW.LOMA.ORG/FINALEXPENSE)

### 2025 LIC FINAL EXPENSE WORKSHOP Managing Final Expense Profitability



**WHO ATTENDS?** Senior management from companies involved in the final expense business, including CEOs and executives in actuarial, claims, sales, marketing, operations, product line, underwriting, and legal/compliance areas.

**HIGHLIGHTS:** In managing small-face life products, small improvements in execution can mean big increases in profitability. This annual workshop covers all areas of final expense administration, management, and marketing. The agenda includes case studies, expert presenters, facilitated discussion, and networking opportunities.



TBD  
[WWW.LOMA.ORG/PRENEED](http://WWW.LOMA.ORG/PRENEED)

### 2025 LIC PRENEED FORUM Succeeding in Preneed



**WHO ATTENDS?** All senior management executives involved in or interested in preneed should attend this one-of-a-kind networking and educational meeting.

**HIGHLIGHTS:** Join us for the life insurance industry's only conference dedicated to the challenges associated with marketing, administering, and managing preneed insurance. This annual forum addresses a wide range of preneed issues including actuarial, legal, marketing, branding, and customer service. The agenda features expert presenters, case studies, facilitated discussion, and networking opportunities.

## About LIMRA and LOMA

For more than a century, we have served as the largest trade association supporting the insurance and related financial services industry. Today, we're working with over 700 member companies in 64 countries to help them understand industry trends, inform their strategies, develop their talent, and create solutions that advance the industry.

From the beginning, LIMRA and LOMA was charged with helping our members tackle not only the business challenges of the day, but those on the horizon, as well. Our research, professional development, and talent solutions programs continue to help the industry confidently navigate the ever-changing landscape — because different times often require new approaches.

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### Advancing the Financial Services Industry by Empowering Our Members With



### The Key Markets We Serve

