

2019 PROGRAM

Distribution Conference for Financial Services

Shifting Sands: Find Your Footing



February 27 – March 1, 2019

Fort Lauderdale Marriott Harbor Beach Resort & Spa

Fort Lauderdale, FL



WEDNESDAY, FEBRUARY 27

CONCURRENT WORKSHOPS — 4:00 to 5:00 p.m.

Caribbean Ballroom V

1. LIMRA Member Benefits: What Are You Missing?

JAMES STELLA, LUTCF, LLIF, Member Relations Director, LIMRA; **FAYE WILLIAMSON, MSM, LLIF**, Member Relations Director, LIMRA

Caribbean Ballroom IV

2. Why Fraud Prevention Makes a Difference

GENE STONE, FLMI, ACS, CLU, Assistant Vice President, Education and Training, LOMA

WOMEN LEADERS' RECEPTION — 5:00 to 5:45 p.m.

Explore and exchange questions, ideas, and solutions with other women executives in the industry. **For LIMRA members only.**

Ocean View Terrace

LIMRA WELCOME RECEPTION — 6:00 to 7:00 p.m.

THURSDAY, FEBRUARY 28

Grand Ballroom F, 3rd Floor

BREAKFAST — 7:15 to 8:15 a.m.

Grand Ballroom B/C, 3rd Floor

GENERAL SESSION — 8:15 to 10:00 a.m.

Opening and Welcome



SEAN O'DONNELL

Vice President, Member Relations
and Consulting
LIMRA

Markets in Transition: How Will Distribution Evolve?



DAVID LEVENSON

President and Chief Executive Officer
LIMRA, LOMA, and LL Global, Inc.

Being Decisive — How to Make Better Choices



DAN HEATH

Co-Author of four New York Times bestselling books,
including **Switch**

Grand Ballroom F, 3rd Floor

REFRESHMENT BREAK — 10:00 to 10:30 a.m.

Sponsored by FlexPaths

CONCURRENT WORKSHOPS — 10:30 to 11:30 a.m.

Caribbean Ballroom V

3. Changing Landscape of Field Leadership...Are You Ready?

JULIE DAVIS, Vice President, Agency Development, Penn Mutual; **DOMINICK IORIO**, General Agent, MassMutual; **NASH SUBOTIC**, General Agent and Chief Executive Officer, Guardian/WestPac Wealth Partners; **Co-moderators: PAM BLALOCK**, Senior Vice President, Career Distribution, National Life Group; **JEFFREY PLUMMER, CLU, CFS**, Lead Regional Vice President, Guardian Life

Caribbean Ballroom VII

4. Creating Lasting Impressions Through Engaging Onboarding Programs

ASHLIE HUSTON, Director of Distribution Programs, American National; **JOHN MURPHY**, Region Executive, Horace Mann; **JOSEPH TABORGA**, Agency Development Center Director, State Farm; **Moderator: JOHN B. SULLIVAN**, Client Relationship Director, LIMRA

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Caribbean Ballroom VI

5. Driving Sales and Customer Experience Through Anti-Fraud Efforts and Innovation

JAMES RUMPH, CFE, CAMS, CPA, CIA, Senior Consultant, Business Consulting, Nationwide; **Moderator: JERRY BLAIR, ChFC, LLIF**, Chief Distribution & Sales Officer, Sammons Financial Group

Caribbean Ballroom IV

6. The Digital Path to Purchase

JENNIFER DOUGLAS, Research Director, Developmental Research, LIMRA; **VIKRAM KAMATH**, Director of Analytics, LIMRA

Caribbean Ballroom I-III

7. A Quest for Simplicity — Using a Single Currency to Compensate Advisors

CINDY CORCORAN, Field Financial Manager, Securian; **LEO HERBERS, FSA, MAAA**, Actuary, Principal Financial Group, Inc.; **JOSEPH O'CONNOR, FSA, MAAA**, Assistant Vice President, MassMutual; **Moderator: MARC RENTSCHLER**, Director, Thrivent Financial Compensation, Thrivent Financial

Grand Ballroom F, 3rd Floor

LUNCHEON — 11:30 a.m. to 1:00 p.m.

CONCURRENT WORKSHOPS — 1:00 to 2:00 p.m.

Caribbean Ballroom VII

8. Practice Management — Moving Your Entire Organization Forward

MARK DEAN, FIC, LUTCF, Director, Business Development & Practice Management, Thrivent; **SPENSER SEGAL**, Chief Executive Officer, ActiFi; **Moderator: BILL PIENIAS**, Senior Vice President, Sales Development, Foresters Financial Services, Inc.

Caribbean Ballroom V

9. Transforming Field Leadership Support

DAVID QUEEN, Sales Director, Nationwide; **JOHN SEABORN**, Strategic Development Manager, MetLife; **DENNIS TATOMIR**, District Manager, Co-operators Insurance
Moderator: ELLEN KUGEL, Director of Agency Business Development, MetLife



Caribbean Ballroom IV

10. Leveraging Data Science and Analytics to Grow the Business

BERNARD ONG, Assistant Vice President, Data Science and Advanced Analytics, Lincoln Financial Group; **HARLAN WAHRMAN**, Assistant Vice President, Analytics Strategy, Western & Southern Financial Group; **Moderator: MARTY KENNEDY**, Assistant Vice President, Head of GA Sales and Recruiting, Lincoln Financial Group

Caribbean Ballroom VI

11. Marijuana Business Owners: Taking the Mystery Out of It

TOM FARRELL, Chief Underwriter, Prudential; **MIKE HAPPOLD, FALU, FLMI, AFSI**, Second Vice President, Underwriting, Munich Re; **Moderator: THOMAS RUTLEDGE**, Divisional Vice President, Independent Distribution, Prudential

Caribbean Ballroom I-III

12. Insights Plus Innovation = A Win-Win Solution...

CLINT PARKER, Executive Vice President, Digital MGA, YouSurance; **ELLIOTT WALLACE**, Vice President and General Manager, Life, LexisNexis Risk Solutions; **Moderator: LAUREN MCCALLUM**, Member Relations and Sales Director, Niche Markets and Specialty Accounts, LIMRA

Caribbean Foyer

REFRESHMENT BREAK — 2:00 to 2:15 p.m.

CONCURRENT WORKSHOPS — 2:15 to 3:15 p.m.

Caribbean Ballroom V

13. How Healthy Teams Drive Healthy Distribution Systems

DANIEL FLYNN, Vice President, Recruiting and Advisor Teaming, MassMutual Financial Group; **MISTY LEIGHTON-PETROSINO**, Investment Advisory Representative, Consolidated Planning, Inc.

Caribbean Ballroom I-III

14. Leading Your Way to Life Sales Growth

NATE KORHONEN, Life Distribution Director, American Family Insurance; **GAURAV SURI**, Co-founder and Chief Executive Officer, Health IQ; **TIM VAN HOOF**, Marketing Director, COUNTRY Financial; **Moderator: GLENN ROTHENBERG**, Head of Marketing, Farmers Insurance

Distribution of Workshops

Please use this as a reference to select one workshop from each time period.

	#	Session Title	Agency-Building	MLEA	Independent Producer	Brokerage	Direct-to-Consumer	Financial Management	Strategic Issues
WEDNESDAY FEB. 27									
4:00 to 5:00 p.m.	1.	LIMRA Member Benefits: What Are You Missing? (Caribbean Ballroom V)	◆	◆	◆	◆	◆	◆	◆
	2.	Why Fraud Prevention Makes a Difference (Caribbean Ballroom IV)		◆	◆	◆	◆	◆	◆
THURSDAY FEB. 28									
10:30 to 11:30 a.m.	3.	Changing Landscape of Field Leadership... Are You Ready? (Caribbean Ballroom VI)	◆						
	4.	Creating Lasting Impressions Through Engaging Onboarding Programs (Caribbean Ballroom VII)		◆				◆	
	5.	Driving Sales and Customer Experience Through Anti-Fraud Efforts and Innovation (Caribbean Ballroom VI)	◆	◆	◆	◆	◆	◆	◆
	6.	The Digital Path to Purchase (Caribbean Ballroom IV)			◆	◆	◆	◆	
	7.	A Quest for Simplicity — Using a Single Currency to Compensate Advisors (Caribbean Ballroom I-III)							
1:00 to 2:00 p.m.	8.	Practice Management — Moving Your Entire						◆	

	Organization Forward <i>(Caribbean Ballroom VII)</i>	◆							
	9. Transforming Field Leadership Support <i>(Caribbean Ballroom V)</i>		◆					◆	
	10. Leveraging Data Science and Analytics to Grow the Business <i>(Caribbean Ballroom IV)</i>		◆		◆	◆		◆	
	11. Marijuana Business Owners: Taking the Mystery Out of It <i>(Caribbean Ballroom VI)</i>					◆		◆	
	12. Insights Plus Innovation = A Win-Win Solution <i>(Caribbean Ballroom I-III)</i>				◆	◆		◆	
2:15 to 3:15 p.m.	13. How Healthy Teams Drive Healthy Distribution Systems <i>(Caribbean Ballroom V)</i>	◆							◆
	14. Leading Your Way to Life Sales Growth... <i>(Caribbean Ballroom I-III)</i>		◆		◆			◆	
	15. Striking the Balance: Managing for Results <i>(Caribbean Ballroom VII)</i>			◆					
	16. Accelerating Into New Channels <i>(Caribbean Ballroom IV)</i>					◆			
FRIDAY MARCH 1									
8:00 to 9:00 a.m.	17. Using Data Analytics as a Roadmap to Success <i>(Caribbean Ballroom V)</i>	◆			◆			◆	
	18. Future of Synergistic Digital/Call Center Distribution <i>(Caribbean Ballroom IV)</i>							◆	

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Caribbean Ballroom VII

15. Striking the Balance: Managing for Results

LUKE COSME, Senior Vice President, Chief Sales and Marketing Officer, Mutual Trust Life Insurance Company; **MICHAEL COX**, Vice President, Sales and Distribution, Midland National; **LARRY SILVERSTEIN, LLIF, FLMI, AALU**, Senior Vice President, Chief Marketing Officer, Lafayette Life Insurance Company; **Moderator: STEVE SANDERS, LLIF**, Senior Vice President, Chief Marketing Officer, Columbus Life

Caribbean Ballroom IV

16. Accelerating Into New Channels

JOHN HELBERG, AALU, ALMI, ACS, Chief Underwriter, Securian Financial; **CHRIS MASON**, Senior Vice President, HealthMarkets; **MIKE TIERNAN, FSA**, Chief Actuary, Cincinnati Life; **Moderator: SEAN MCKINLEY, CLU**, Field Manager, Cincinnati Life

Grand Ballroom F, 3rd Floor

REFRESHMENT BREAK — 3:15 to 3:45 p.m.

Sponsored by Greater Fort Lauderdale Convention & Visitors Bureau

Grand Ballroom B/C, 3rd Floor

GENERAL SESSION — 3:45 to 4:45 p.m.

Unleash Your Potential



MOLLY FLETCHER

CEO

Business Author and Former Sports Agent

FRIDAY, MARCH 1

Grand Ballroom F, 3rd Floor

BREAKFAST — 7:00 to 8:00 a.m.

CONCURRENT WORKSHOPS — 8:00 to 9:00 a.m.

Caribbean Ballroom V

17. Using Data Analytics as a Roadmap to Success

MICHAEL ABRAMS, Vice President, Planning and Analysis, Prudential Advisors;
JANE NICHOLS, Senior Director, Distribution Strategy, Field Business Intelligence,
Northwestern Mutual; **Moderator: WILLIAM IDZOREK, CLU, ChFC, FIC, RICP**, Vice
President, National Sales Group, Thrivent Financial

Caribbean Ballroom IV

18. Future of Synergistic Digital/Call Center Distribution

CHRISTOPHER COVIELLO, Assistant Vice President, Digital Products, USAA;
MICHAEL DALE, CFP, ChFC, CLU, CRPC, Executive Director, Financial, Planning, and
Advice, USAA; **KENNY SUTTON, LLIF, ACPMPO, CPM, CPMM**, Life Insurance
Experience Owner, USAA

Grand Ballroom F, 3rd Floor

REFRESHMENT BREAK AND EXHIBITOR PRIZE DRAWING — 9:00 to 9:30 a.m.

Sponsored by IBM

Grand Ballroom B/C, 3rd Floor

GENERAL SESSIONS — 9:30 to 11:15 a.m.

Technology and the Future of Work



CRAIG BEDELL

*Global Insurance Industry Executive
IBM Global Insurance Industry Leadership Team
IBM Industry Academy Member*

On Solid Ground: Understanding the New Distribution Landscape



PATRICK LEARY, LLIF

*Corporate Vice President, Distribution Research
LIMRA*

Thank You to Our Committee Members

For their service and dedication in crafting an outstanding program.

For complete committee listings please visit our conference event app and search under Conference Resources.

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INTRODUCING THE ROBERT A. KERZNER SCHOLARSHIP PROGRAM

Established to honor Bob Kerzner for his contributions to the insurance industry and his years of service as CEO of LIMRA, LOMA, and LL Global, this educational award continues his legacy of lifelong learning and advocacy for professional development.

Employees of all LIMRA and/or LOMA member companies are eligible to enter for a chance to receive a scholarship for:

- The courses required to complete the FLMI designation
- The courses required to complete the FSRI designation
- The capstone program for the LLIF designation

Applications are due May 31. Visit LIMRA.com for more information.

2020 DISTRIBUTION CONFERENCE FOR FINANCIAL SERVICES

February 25 – 27, 2020
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