



The Conference Series

The World of Financial Services

Come find the right conferences for you!



2020 Conference Series



Don't miss out on one of the best opportunities to take your game to the next level.

Live events — with others from the industry — provide unique learning and career building opportunities that you just can't find anywhere else.

U.S. and Canada

▶ ENROLLMENT TECHNOLOGY STRATEGY SEMINAR February 4 – 5, 2020

JW Marriott, New Orleans, LA

For more information or to register: www.limra.com/etss

Who Attends: Individuals that lead: worksite/voluntary initiatives; enrollment strategy or solutions; vendor and/or exchange management; enrollment and/or benefit administration technology. All participants should be very experienced in their field.

Highlights: This is an opportunity for LIMRA member insurance companies and benefits administration technology providers to participate in an open discussion on how to cohesively work together and define better outcomes. Our goal is to connect participants with peers and technology purveyors to learn, network, and share innovative ideas to help identify potential solutions to existing challenges.

▶ DISTRIBUTION CONFERENCE FOR FINANCIAL SERVICES February 25 – 27, 2020

Tampa Marriott Water Street, Tampa, FL

For more information or to register: www.limra.com/distributionconf

Who Attends: Distribution professionals, financial management specialists, and others that have a vested interest in channel growth, productivity, and reshaping distribution to succeed in today's business environment. Attendees include heads of distribution, sales, marketing support, product development, and training.

Highlights: This conference brings you industry experts, top-notch distribution professionals, and unsurpassed networking opportunities. We'll examine distribution systems in flux and the strategies to shift these systems. Enjoy the freedom to attend any of the workshops in these key distribution tracks — agency building, brokerage, independent, multi-line, and direct-to-consumer.

▶ LOMA CUSTOMER EXPERIENCE CONFERENCE March 25 – 27, 2020

InterContinental Hotel New Orleans, New Orleans, LA

For more information or to register: www.loma.org/cxconf

Who Attends: Financial services professionals responsible for the design and delivery of CX. This includes the areas of claims, customer service, IT, marketing, and new business.

Highlights: As a customer experience professional, you understand the industry is ever-changing and you must keep up with the latest trends to stay relevant. At this conference, you will learn how to shape the future of your customer experience strategies to drive improved customer satisfaction, loyalty, and advocacy. Leading brands will share the experience management programs they've built. And you'll network with and learn from some of the brightest minds in your field.

▶ REGULATORY COMPLIANCE EXCHANGE (PRESENTED BY LIMRA/LOMA) March 31 – April 2, 2020

Portofino Bay at Universal, Orlando, FL

For more information or to register: www.limra.com/rcex

Who Attends: This conference is designed for Chief Compliance Officers, compliance and internal audit, legal counsel, general counsel and attorneys, compliance and market conduct VPs, directors, and managers, compliance, market conduct and legal staff, fraud prevention and mitigation leaders and staff, audit and risk management managers and staff, and AIRC designees (who receive \$100 off the member rate when they register).

Highlights: Created by compliance professionals for compliance professionals, attendees enjoy this highly interactive exchange of ideas and insights about regulatory issues, and learn effective compliance practices from peers and industry experts. If it's on your mind, it's on the agenda. Don't miss this engaging opportunity to network and learn.



▶ LIFE INSURANCE CONFERENCE

(PRESENTED BY LIMRA/LOMA/SOA/ACLI)

April 20 – 22, 2020

The Grand America Hotel, Salt Lake City, UT

For more information or to register: www.limra.com/lifeconf

Who Attends: Professionals involved in the development, operations, marketing, distribution, regulation, technology, or administration of life insurance products.

Highlights: Network with your peers and leading industry experts while gaining insight into the latest trends in individual life insurance. The cross-functional nature of the event provides the opportunity to interact with and learn from those in other disciplines as well as your own. With over 30 workshops and multiple general sessions, the Life Insurance Conference will cover the important issues and identify strategies that will shape the industry's future.

▶ RETIREMENT INDUSTRY CONFERENCE

(PRESENTED BY SECURE RETIREMENT INSTITUTE/SOA)

April 22 – 24, 2020

The Grand America Hotel, Salt Lake City, UT

For more information or to register: www.limra.com/retireconf

Who Attends: Professionals across the full spectrum of the retirement industry including product, marketing, distribution, and strategy for both retail and institutional markets. The conference draws leaders across the industry focused on growing and serving the annuity, investment, and workplace savings businesses.

Highlights: This important conference covers the latest strategic, sales, product, operations and administration, marketing and distribution trends, as well as regulatory issues that impact the retirement industry. Conference partners, the LIMRA LOMA Secure Retirement Institute and the Society of Actuaries, deliver highly relevant and present-day focused content.

▶ LIMRA AND LOMA CANADA ANNUAL CONFERENCE

(PRESENTED BY LIMRA/LOMA)

May 21, 2020

Manulife, Toronto, Ontario, Canada

For more information or to register: www.loma.org/llcac

Who Attends: The LIMRA and LOMA Canada Annual Conference is a key event that brings together senior executives and leaders across diverse sectors of the financial services industry as well as experts and trailblazers from related industries that convene for strategic business insights and high-level networking.

Highlights: The LIMRA and LOMA Canada Annual Conference offers ideas and insights from leaders who have put their vision into action. Learn how they created innovative strategies, harnessed their workforce talents and skills, and deployed technology to achieve success.

▶ THE MARKETING CONFERENCE

May 27 – 29, 2020

Caesars Palace, Las Vegas, NV

For more information or to register: www.limra.com/marketingconf

Who Attends: Financial services professionals in all areas of marketing — product, consumer, producer, digital, and strategy — as well as research and consumer insights and communications, advertising, and branding.

Highlights: This event focuses on areas critical to today's marketers, including digital initiatives, consumer insights, customer experience, and overall marketing strategy. Attendees will discover how to communicate the importance of our industry to the modern consumer using the latest marketing trends. LIMRA is also proud to sponsor the 2020 Creative Connections Award — recognizing creative excellence, innovation, and achievement in financial services marketing. Winners will be announced at a special awards ceremony at the event.

▶ ADVANCED SALES FORUM

August 3 – 5, 2020

Coronado Island Marriott Resort & Spa, Coronado, CA

For more information on this conference, check our conference site regularly for updates: www.limra.com/asf

Who Attends: Advanced sales and marketing executives, estate and business planning specialists with carriers, distributors, BGAs and IMO's, CMO's, 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 forum 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 implementable ideas from experts.



2020 Conference Series



► SUPPLEMENTAL HEALTH, DI & LTC CONFERENCE

(PRESENTED BY LIMRA/LOMA/SOA)

August 5 – 7, 2020

Hyatt Regency Washington on Capitol Hill, Washington, DC
For more information on this conference, check our conference site regularly for updates: www.limra.com/shdiltc

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, individual disability insurance, or long-term care/combo 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, hospital indemnity — as well as individual disability insurance and long-term care/combo products. The cross-functional nature of this event provides the opportunity to interact and learn from those in other disciplines as well as your own. With over 30 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. No other conference can offer you the depth and breadth of information that you'll find here.

► GROUP & WORKSITE BENEFITS CONFERENCE

September 15 – 17, 2020

Renaissance Boston Waterfront Hotel, Boston, MA
For more information on this conference, check our conference site regularly for updates: www.limra.com/gwbc

Who Attends: Executives and professionals responsible for strategy, marketing, and distribution of workplace benefits, including life, disability, critical illness, accident, other supplemental health products, dental, vision, and healthcare plans.

Highlights: Gain new insights for increased success in the benefits marketplace. You will hear from peers, customers, and leading experts in group insurance, voluntary/worksite benefits, and healthcare.

► LIMRA ANNUAL CONFERENCE

October 25 – 27, 2020

Chicago Marriott Downtown Magnificent Mile, Chicago, IL
For more information on this conference, check our conference site regularly for updates: www.limra.com/annual

Who Attends: The LIMRA Annual Conference is one of the largest gatherings of senior executives representing diverse sectors of the financial services industry. 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 Annual Conference offers an unparalleled forum where top leaders and executives gather to discuss the latest issues and trends facing the financial services industry today. Experience a program designed to provide actionable ideas and strategies to enhance your marketing and distribution efforts.





International

► AGENCY INNOVATION CONFERENCE

(PRESENTED BY LIMRA/AIR/AAN)

July 27 – 28, 2020

Mandarin Oriental Hotel, Kuala Lumpur, Malaysia

For more information or to register: www.limra.com/AIC20

Who Attends: Life insurance and financial services professionals that are responsible for, or involved with, agency management and transformation, strategy, sales, and training throughout the Asia-Pacific Region. Heads of agency, distribution executives, sales managers and agents will all benefit from the content being presented and the networking opportunities available during this event!

Highlights: The planned session topics at this event will illustrate the many ways companies, executives, and top agents are innovating within sales, operations, and strategy to gain a competitive advantage. All registered attendees will also receive a ticket to attend the 5th Annual Asia Trusted Life Agents & Advisers Awards Dinner on 27 July, recognizing the achievements of individuals who have touched the lives of people in many different ways and the corporate executives, companies, associations and service providers who help agents and advisers on their path to excellence.

► CARIBBEAN INSURANCE CONFERENCE

(PRESENTED BY LIMRA/LOMA/IAC)

September 27 – 29, 2020

Atlantis, Paradise Island, Bahamas

For more information or to register: www.limra.com/CIC20

Who Attends: The Caribbean Insurance Conference attracts a diverse participants' profile of more than 500 delegates in the Caribbean insurance and reinsurance industry. Attendees include mid to senior level executives with life, health, and/or P&C insurance responsibilities throughout the Caribbean region, as well as top regional managers and producers servicing these markets.

Highlights: The Annual Caribbean Insurance Conference, renowned as the premier regional conference for professionals in the insurance industry, provides an information sharing and collaborative forum for senior Caribbean insurance executives as well as regulatory authorities, reinsurers, third party administrators, technology service providers, brokers and other special groups with interest in the Caribbean insurance industry.

► LATIN AMERICAN CONFERENCE – INSURANCE DAYS

(PRESENTED BY LIMRA/LOMA/APESEG)

November 23 – 24, 2020

Westin Lima Hotel & Convention Center, Lima, Peru

For more information or to register: www.limra.com/LACONF20

Who Attends: Head office chief executives and key executives of financial services companies operating in Latin America. As senior executives, they are most concerned about emerging trends and developments in marketing, distribution and corporate management.

Highlights: Join with other insurance leaders and executives from throughout the Latin American region to hear the latest trends, tools, and best practices for enhancing your company strategy. Attendees will have the unique opportunity to hear about the development of existing channels, as well as predictions for new lines of business, technologies, and regulations that will impact the region.



2020 Conferences at a Glance



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INTERNATIONAL

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TO REGISTER OR FOR MORE INFORMATION, CONTACT:

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