



Distribution Conference for Financial Services

Power of the Past – Force of the Future

February 25 – 27, 2020

Tampa Marriott Water Street, Tampa, FL USA



www.limra.com/distributionconf

Power of the Past — Force of the Future

Customer expectations are shifting to an omni-channel world, challenging insurers to provide channel options and choice across the entire value chain. In addition, new channel options are rapidly emerging, such as marketplaces, embedded insurance in other businesses, comparison sites and direct distribution.

It has generally been estimated that distribution consolidation in the U.S. will continue, as the number of agencies decline. In this changing and competitive marketplace, implementing sales enablement processes and executing on client engagement strategies will be critical for growth.

Building on the best from the past and advancing towards the future, we grapple with the changes to our systems, practices and processes. We must strike a balance and manage the transition as we consider the issues of talent, technology, rewards and compensation, regulatory compliance, and the changing consumer.

This year's conference will address how you can manage the transition in our industry by drawing on the power of the past yet propelled by the force of the future.

Join us in February in Tampa, Florida to learn from industry experts and top-notch distribution professionals.

General Session Highlights

Distribution of the Future



DAVID LEVENSON, CFA, FSA
*President and Chief Executive Officer
LIMRA, LOMA, and LL Global, Inc.*

Consumer expectations are evolving rapidly and so is the way that financial services products are marketed and distributed. What might this all look like in the future? Which distribution channels are well positioned? Dave Levenson will discuss these questions and share LIMRA's insights on strategies every organization should consider today.

The Future of Financial Services: What's Next?



MIKE WALSH
*Founder & CEO
Tomorrow*

Every aspect of the financial services ecosystem is under pressure from disruptive forces, new entrants, and emerging technologies. Whether it be payments, deposits, lending, capital raising, or insurance — financial institutions in the future will need to re-imagine both their products and platforms in order to remain relevant to tomorrow's customers. Mike Walsh will focus on the human impact of disruptive change. Only by understanding the mindset of tomorrow's customers can financial services institutions relentlessly attack sources of consumer frustration and friction, while providing a compelling platform for the emerging digital ecosystem.



Authenticity and Inclusion: Changing From the Inside Out



SANDY EICHEL

Diversity and Inclusion Consultant and Wealth Management Advisor
Northwestern Mutual

Are you frustrated by hearing that the lack of diversity in our industry is a problem but no ways to fix it? Sandy Eichel has a fresh and positive approach to changing our industry and ourselves so we can continue to flourish in the future. Through music, vulnerability, and humor, Sandy shares how her own journey of authenticity led to her passion to change our industry. Using what she calls, "Changing From the Inside Out," leaders can forge a path to greater inclusion and success in the ever-changing future of this country.

The Re-Architecting of Business — Spotlight on Financial Services



CAM MARSTON

Author, Columnist, Blogger, and Lecturer
Generational Insights

What will technology plus changing customer expectations mean for financial services providers going forward? And how do they prepare? Cam Marston, a leading expert on the impact of generational change and its impact on the marketplace, takes a close look at the industry and how financial services providers need to provide a new type of value to the next generation of client, especially considering the anticipated changes that technology will bring about.

Panel: Executive Perspective: Force of the Future



MUNJAL SHAH

Co-Founder and CEO
Health IQ



WES THOMPSON

President and CEO
M Financial Group



DOYLE WILLIAMS, CLU, CPCU, ChFC

Executive Vice President and CXO
COUNTRY Financial



JAMES KERLEY, Moderator

Managing Partner
Clearview Partners

What will the salesforce of the future look like? As our industry's distribution strategy continues to evolve, how will insurance carriers and distributors match the needs and wants of today's consumers? Our executive panel will help us define the "force of the future," by sharing how they see distribution changing. Looking through the lenses of a traditional Career Channel, an independent Life Brokerage Distributor, and an online Insurance Distributor, we will examine the past, understand the current, and forecast the future of Distribution. Get ready to explore with three top distribution executives, who are leading the change and building the salesforce of the future.

Distribution Conference for Financial Services



Program Overview

► Tuesday, February 25

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

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.)

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

► Wednesday, February 26

BREAKFAST — 7:15 to 8:15 a.m.

OPENING AND WELCOME — 8:15 to 8:30 a.m.

SEAN O'DONNELL

Senior Vice President, Member Relations
LIMRA

GENERAL SESSION 1 — 8:30 to 9:00 a.m.

Distribution of the Future

DAVID LEVENSON, CFA, FSA

President and CEO
LIMRA, LOMA, and LL Global, Inc.

GENERAL SESSION 2 — 9:00 to 10:00 a.m.

The Future of Financial Services: What's Next?

MIKE WALSH

Founder & CEO
Tomorrow

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

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

LUNCHEON AND BREAK — 11:30 a.m. to 1:00 p.m.

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

REFRESHMENT BREAK — 2:00 to 2:15 p.m.

ROUNDTABLE DISCUSSIONS — 2:15 to 3:30 p.m.

REFRESHMENT BREAK — 3:30 to 4:00 p.m.

GENERAL SESSION 3 — 4:00 – 5:00 p.m.

Authenticity and Inclusion: Changing From the Inside Out

SANDY EICHEL

Diversity and Inclusion Consultant and
Wealth Management Advisor
Northwestern Mutual

► Thursday, February 27

BREAKFAST — 7:00 to 8:00 a.m.

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

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

GENERAL SESSION 4 — 9:30 to 10:30 a.m.

Panel: Executive Perspective: Force of the Future

MUNJAL SHAH

Co-Founder and CEO
Health IQ

WES THOMPSON

President and CEO
M Financial Group

DOYLE WILLIAMS, CLU, CPCU, ChFC

Executive Vice President and CXO
COUNTRY Financial

JAMES KERLEY, Moderator

Managing Partner
Clearview Partners

GENERAL SESSION 5 — 10:30 to 11:30 a.m.

*The Re-Architecting of Business —
Spotlight on Financial Services*

CAM MARSTON

Author, Columnist, Blogger, and Lecturer
Generational Insights



Distribution of Breakouts

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

	# Session Title	Agency-Building	MLEA	Independent Producer	Brokerage	Direct-to-Consumer	Financial Management
TUESDAY FEB. 25							
4:00 to 5:00 p.m.	1. Change Management: Integral to Culture Change	◆	◆				◆
	2. Conquering Unstructured Data to Win New Business and Delight Your Customers	◆	◆	◆	◆	◆	◆
WEDNESDAY FEB. 26							
10:30 to 11:30 a.m.	3. The Business Case for Diversity and Multicultural Recruiting	◆	◆				◆
	4. The Only Constant Is Change: Optimizing Field Communications	◆	◆		◆		
	5. Automated Underwriting: Is It Everything You Want?	◆	◆	◆	◆	◆	◆
	6. Everything You Wanted to Know About Marijuana and Were Afraid to Ask			◆	◆		
	7. Customer Journey – Leveraging D2C to Reach New Customers					◆	
	8. Financial Advisor Succession...Securing the Future of Distribution	◆	◆	◆	◆		◆
	9. Creating a Multi-Line Culture of Leadership and Accountability		◆				
1:00 to 2:00 p.m.	10. Hybrid-Virtual Wholesaling: Today and Tomorrow	◆	◆	◆	◆	◆	◆
	11. Bullish About Life Brokerage: 2020 and Beyond...			◆	◆		
	12. Ventures an InsurTech – What Is Their Role in D2C?					◆	
	13. Recruiting to the Industry – A Critical Value Proposition	◆	◆			◆	◆
	14. Producer Fraud: Who's Protecting Us?	◆	◆	◆	◆	◆	◆
2:15 to 3:30 p.m. Roundtable Discussions	15. Managing Productive Distribution Relationships	◆	◆	◆	◆		◆
	16. How to Drive Sales and Value in Today's Regulatory Environment	◆	◆	◆	◆		◆
		◆	◆	◆	◆		◆
THURSDAY FEB. 27							
8:00 to 9:00 a.m.	17. Attract, Develop, and Retain High Performing Leaders	◆	◆	◆			
	18. Collaborative (Not Combative) Field Engagement	◆	◆	◆	◆		◆
	19. Innovation and Design Thinking – Focus on the Customer	◆	◆	◆	◆	◆	◆

- – Session content developed by this program committee
- ◆ – Content relevant to this constituency

Breakout Sessions

► Tuesday, February 25

4:00 to 5:00 p.m.

1. Change Management: Integral to Culture Change

Join in the conversation with a panel of agency field leaders — all experts in leading workplace change initiatives. Moderated by Meryl Rosenthal, CEO of FlexPaths, the panel will share how they have led physical, cultural, and work practice changes. Learn about how they've gleaned buy-on, combatted challenges, and brought about change to create a more relevant, resonating client, and advisor experiences.

PAM BLALOCK, Senior Vice President, Career Distribution, National Life Group; **FIONA CUDDY**, President, Qualified Financial Services; **LAILA HICK**, Vice President, Transformation/Field Change, Career Distribution, Northwestern Mutual; **Moderator: MERYL ROSENTHAL**, CEO & President, FlexPaths, LLC

2. Conquering Unstructured Data to Win New Business and Delight Your Customers

One of the biggest challenges in today's digital world is figuring out how to transform new business underwriting, claims, sales, distribution and client on-boarding, while at the same time augmenting your expert knowledge workers with better tools and proactive recommendations. Leading companies are ahead because they're leveraging AI to translate unstructured data into valuable insights for expert human decision-making and better client experiences. Join us in this timely session to hear how companies are really using AI to increase premiums, shorten the underwriting process and increase customer satisfaction to deliver the best possible outcomes.

In this session, you will learn how companies leverage AI to:

- Reduce customer on-boarding time
- Accelerate underwriting processing from months to days
- Speed up new business quoting by eliminating document processing

EMILY CHIEN, IBM Services Cognitive Digitization Insurance Lead, IBM; **STEVE DIAMOND**, Vice President and Partner, Financial Services Sector, Insurance, IBM Global Business Services

► Wednesday, February 26

10:30 to 11:30 a.m.

3. The Business Case for Diversity and Multicultural Recruiting

In order to remain relevant in this industry, it is critical that recruiting women and diverse candidates into financial professional careers is a strategic priority. Sustainable, tangible results require a paradigm shift from how and who we've recruited in the past and the development of a culture of inclusion and cultural competence at the firm level. In this session, leaders from Mass Mutual and Prudential will share strategies, best practices, and key business results as it relates to recruiting, empowering, and developing women and diverse candidates in financial professional and sales leadership roles.

KATIE MARTINEAU, Head of Field Recruiting Support, MassMutual; **MICHELLE PEDIGO**, Head of Field Management, South Region, MassMutual; **DENA TAYLOR**, Vice President, field Talent Acquisition, Prudential Financial; **Moderator: TERRI KINSELLA**, Vice President, Advisor Onboarding & Operations; Prudential Financial

4. The Only Constant Is Change: Optimizing Field Communications

Effective communication is critical as companies adjust their goals, structure, processes, and technology to achieve growth and better serve today's consumer. As humans, our brains are hard wired to resist change. Acceptance increases when the message is targeted, focusing on what the audience cares about most and is delivered in multiple ways by individuals the audience prefers to hear from. Increase your field communication effectiveness by combining the rule of 7 and different communication vehicles. This workshop will utilize a panel, led by an entrepreneur with expertise on the topic of change management, to highlight how several companies are enhancing their own communications with distribution personnel.

KOLETTE DUNLAP, Leadership Development Associate, Agency/Marketing, State Farm; **DARIA LEE SHARMAN**, Enterprise Insights and Analytics Officer, Pacific Life; **KRISTEL WOMBLES**, Manager, Agency Services, State Farm; **Moderator: REBECCA SANCHEZ**, Founder and Principal Consultant, Peopleside



5. Automated Underwriting: Is It Everything You Want?

Automated underwriting is now commonplace with many carriers. Costs associated with auto underwriting can quickly get out of hand if not properly managed. In addition, the engines leading to decisions need to be constantly reviewed with pre and post audits. What is the future of auto-underwriting? What are the challenges/opportunities for carriers, their sales departments, and our distributors? Hear from distribution leaders and underwriters that have experienced the pros and cons of automated underwriting and how they see it evolving in the years ahead.

LUKE COSME, Senior Vice President, Chief Sales and Marketing Officer, Mutual Trust Life; **KEVIN JENSON**, President and CEO, Asurea Wholesale; **BARBARA LUTZ, FALU, FLMI, ACS**, Assistant Vice President, Chief Underwriter, Fidelity & Guaranty Life; **Moderator: STEVE SANDERS, LUF**, Vice President, Life Distribution, Fidelity & Guaranty Life

6. Everything You Wanted to Know About Marijuana and Were Afraid to Ask

Many states have enacted changes to their cannabis laws for either pharmaceutical or recreational use. This session will look at the evolving landscape from several perspectives:

- The complexities of federal law versus state law
- The complexities of federal law versus Financial Crimes Enforcement Network (FinCEN)
- How life insurance carriers view the user versus the investor-/marijuana-related businesses
- How marijuana laws have evolved in Canada and what that could mean for the U.S.
- Breaking news: The vaping issue

Your business will be affected by this growing and complex issue; stay ahead of the curve by understanding the “highs and lows” of the evolving marijuana market.

JOEL LARSON, Underwriting Director, Prudential; **ELLEN MILNE**, Head of Insurance Relationship Management, MassMutual Financial Group; **DOUG PARROTT**, Assistant Vice President, Chief Underwriter, North America, Foresters Financial; **Moderator: THOMAS RUTLEDGE, CLU, ChFC**, Divisional Vice President, Prudential

7. Customer Journey — Leveraging D2C to Reach New Customers

Consumers today expect much more from companies with whom they do business. Engaging with them the right way is critical. In this session, a panel of industry experts will discuss all facets of the customer journey:

- Acquisition — Data and digital to reach prospects at the perfect time in the buying cycle
- Engagement — Content needs are evolving
- Application/Purchase — Online and #800 and...XYZ — allowing customers to buy how/where they want
- Policy Delivery — Omni
- Engagement (post-purchase) — How to keep customers engaged

JUNEEN BELKNAP KIRK, Principal, Insurance Practice, PricewaterhouseCoopers Advisory Services LLC **RICHARD DE SOUSA**, Senior Vice President, Strategic Partnerships, SCOR Global Life Americas; **PHIL MURPHY**, Vice President, Insurance, Ethos Life; **Moderator: GLENN ROTHENBERG**, Head of Marketing Life, Farmers Insurance

1:00 to 2:00 p.m.

8. Financial Advisor Succession...Securing the Future of Distribution

According to LIMRA, 27 percent of agency-building advisors are over age 55. LIMRA research also tells us that 99 percent of clients believe their advisor has a succession plan, but only 50 percent do. These studies also show that 46 percent of clients believe the succession will be seamless. Not surprisingly, when an advisor retires or exits the business without a succession plan, many clients transition to other firms. In this session, a panel explores lessons learned and key strategies for proactive FA succession planning, including the types of agreements used in FA succession plans, the ideal successor profile, and how to identify a successor.

STEWART DAVIS, Westshore Financial Group, General Agent, Guardian; **HEATHER SCHER**, Vice President, Field Development, Penn Mutual Life; **GREG WINSPEER, CLU**, Vice President Field Development and Training, National Life Group; **Moderator: JEFFREY PLUMMER, CLU, CFS**, Lead Regional Vice President, Guardian

9. Creating a Multi-Line Culture of Leadership and Accountability

In today's ever-changing distribution landscape, one constant is the need to create a culture of accountability to impact productivity. Success is accomplished with effective programs that develop and empower front-line managers and experienced leaders to grow the organization. In this interactive panel discussion, you'll learn what several multi-line organizations are doing to develop field managers, hone their coaching skills, and foster a culture of leadership and accountability.

BRAD COWAN, Senior Vice President, Paul Davis Restoration; **LEON FITCH**, Regional Field Executive, American National; **ANITA PATEL, LUTCF**, Sales Director, Liberty Mutual; **NICOLE VAUGHN, LUTCF**, Sales Representative, Liberty Mutual; **Moderator: JOEY DAVENPORT, CLF, CLU**, President, Hoopis Performance Network

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10. Hybrid-Virtual Wholesaling: Today and Tomorrow

Effective wholesaling, improved productivity, and relationship building have long been keys to successful sales growth. Leveraging technology for marketing, recruiting, and training has cut costs, but will technology ever replace the human desire for in-person recruiting and relationship building? Meetings hosted through Skype and GoToMeeting are examples of virtually facilitated interactions. This workshop will teach new ideas and models being experimented with by many carriers to successfully execute in today's marketplace. Learn how you can leverage technology to see more people and grow sales more efficiently and at less cost.

CATHY JO BORGMAN, CPCU, FLMI, ACS, IW Sales Desk Director, Pacific Life; **MICHAEL COX**, Vice President, Sales and Distribution, Midland National Life; **Moderator: JOHN DELPOZZO, CLU, LUTCF**, Senior Vice President, PGA Distribution and Marketing, Ohio National

11. Bullish About Life Brokerage: 2020 and Beyond...

Our objective is to get out in front of current issues like low interest rates, regulatory changes, and the decreasing life agent population. In addition to outlining their current structure and foundation, our panelists will talk about their 2020 and beyond strategies for growing profitable life insurance sales. Primary questions addressed will include:

- Value Proposition: Details about their current/future scope and direction
- Key Opportunities: Where they see the greatest opportunities for growing life sales
- Challenges: Less about what those are and more about how their plans will take challenges in stride while continuing to grow
- What Their Needs Are From Life Insurance Carriers: Our objective here is to rally the LIMRA carrier members toward the common goals that will fuel life insurance sales growth in the new decade ahead

MICHAEL FURGIUELE, Head of Product and Carrier Strategies, Covr Financial Technologies; **JEREMY HALLETT**, CEO, Hallett Financial and Quotacy; **AMY KNISELEY**, Sales Vice President Life/LTC, Highland Capital Brokerage; **Co-Moderators: CHUCK ANDERSON**, National Sales Director, Securian Financial Group; **STEVE ROBINSON**, Vice President, Head of U.S. Partnership Strategy, Legal and General America

12. Ventures and InsurTech — What Is Their Role in D2C?

Join us as we discuss the growing impact of venture capital, InsurTech, and in-house innovation labs and funds on the life insurance industry:

- VC's perspective on InsurTech
- Impact of InsurTech in life and annuity
- VC: CVC the future of startup in the space
- Startups and insurance, a new world
- Is InsurTech the future?
- How our industry can engage with InsurTech

DREW ALDRICH, Managing Director, American Family Ventures; **IAN SHERIDAN**, Co-Founder and Managing Director, Vestigo Ventures; **TROY VOSSELLER**, Co-Founder, gener8tor; **Moderator: TODD LEE**, Vice President, Marketing and Digital, Western & Southern Financial Group

ROUNDTABLE DISCUSSIONS — 2:15 to 3:30 p.m.

What creative thinking from other channels might be applied to your distribution? Join us for cross-channel strategic discussions with your peers. Choose from the areas below to participate in this idea exchange and learn what others are thinking across the industry.

13. Recruiting to the Industry — A Critical Value Proposition

According to LIMRA's 2019 Insurance Barometer Study, there is a life insurance market of 23 million consumers who say they need life insurance and do not currently own it. We must grow our sales force in order to meet this consumer need. The call to action is for all distribution channels: agency building, MLEA, and independent. We must also help BGAs and IMOs find and develop new associates, and D2C attract and retain the right talent for increasingly important call centers.

How can we compete with other industries and attract younger workers to our business? We have what the younger generation say they want in a career. Why are they not seeking this out? Join this discussion to understand how we need to change our value proposition to appeal to this next generation.

14. Producer Fraud: Who's Protecting Us?

Fraud, including what is unknown and undetected by insurers, is a costly and challenging problem facing our industry. Most firms have dedicated resources to combat underwriting and claims fraud, but what about producer fraud — specifically, involving commissions? The solution to the problem of producer fraud may be in creating an industrywide-shared database and alert system using carrier data that enhances the trust and transparency among all parties involved. Come to this roundtable and share your experiences, insights, concerns, and innovative solutions with other likeminded distribution leaders.



15. Managing Productive Distribution Relationships

The CRM process differs across the range of channels, because carriers' connection and control differ among affiliated, independent, and brokerage distribution. In this group of roundtable discussions, the objective is to identify ways to create a seamless, satisfying customer experience for the insured by working with the primary point of distribution contact.

We'll explore:

- What data can be collected (and how) to maximize customer satisfaction and appropriate coverage
- What works and what doesn't (programs, tactics, incentives, communications)
- How leads can be generated and appropriately managed

16. How to Drive Sales in Today's Regulatory Environment

Regulation is one of the forces driving change in the way we distribute our products. Some companies already modified their sales process in order to comply with the since-vacated DOL Fiduciary Rule, but as we enter 2020, internal working groups are assembling once again to comply with new federal and state regulations governing registered and non-registered products.

Discuss with other attendees the impact that regulations such as the SEC's Regulation Best Interest and New York State's Reg 187 could have on sales. A variety of topics can be explored, including documentation of advice, appropriate marketing materials, allowable sales incentives, and how to mitigate conflicts of interest.

► Thursday, February 27

8:00 to 9:00 a.m.

17. Attract, Develop, and Retain High Performing Leaders

Continual change and dynamic environments characterize the current financial services industry. To thrive during this demanding time there must be added focus on leadership development. In this session, experts share strategies their firms use to convince prospective leaders that leadership is an attractive career option including developing a clear career path to leadership, training, and compensation. You'll leave with proven best practices to design your own high-performance leadership development program and achieve breakthrough results!

DOUG LENNICK, CFP, Chief Executive Officer, Founder, think2perform Leadership Consulting; **MARK RICHARDS**, Senior Director, Field Leadership Development, Northwestern Mutual; **MATT WALKER**, Director, Field Leadership and Team Support, Thrivent Financial; **Moderator: WILLIAM IDZOREK, ChFC, CLU**, Vice President, Advisor Support, Thrivent Financial

18. Collaborative (Not Combative) Field Engagement

The field is a valuable source of information and can be a critical partner in advocating for change within an organization. But what are the most effective means to engage with the field, get their input, and build collaborative solutions — particularly around compensation and related financial management issues? What are the critical factors to consider? What models work best? This session will share how three organizations have created successful partnerships with the field to support and champion change throughout their organizations.

VANESSA MORIN, Director, MassMutual; **GREG STEINBRENNER**, Senior Director, Field Rewards, Northwestern Mutual; **TIM TARRENCE**, Director, Advisor Strategy, Mutual of Omaha; **Moderator: JON SINDT, CSCP**, Project Director, Mutual of Omaha

19. Innovation and Design Thinking — Focus on the Customer

Innovation leads from Nationwide Financial will discuss innovation and design thinking and how they focus on the customer to drive innovation in direct and other channels. Help lead your organizations in innovation. After the session, participants will:

- Be familiar with design thinking
- Understand managing for total innovation
- Be able to leverage actionable takeaways and innovation tools
- Have had fun (crucial for adult learning)

(Applies to direct to consumer and all other channels.)

MICAH FENING, NF Innovation Portfolio and Domain Lead, Nationwide; **JENNY YOUNG**, NF Innovation Culture Lead, Nationwide; **Moderator: BOBBI JO ALLAN**, Assistant Vice President, NF Innovation, Nationwide

Distribution Conference for Financial Services



Conference Details

TO REGISTER

Register online: www.limra.com/distributionconf

REGISTRATION FEES

Early Registration Rates — By January 30, 2020

Member: \$1,320

LOMA Member (but not LIMRA): \$1,980

Non-member: \$2,640

After January 30, 2020

Member: \$1,620

LOMA Member (but not LIMRA): \$2,430

Non-member \$3,240

LIMRA requires prepayment of registration fees prior to all conferences and meetings. **Please make checks payable to LIMRA in U.S. dollars drawn on a bank in the United States.** For vendor registration fees, call Event Registration at 800.235.4672 (U.S. and Canada) or 860.285.7789.

SPOUSES/GUESTS: A registration fee of \$100 is available to spouses and guests of registered attendees. Individuals in an industry-related position, co-workers, or associates do not qualify. We invite spouses/guests to participate in the event's food and social functions and ask that they wear their badge to these events. Participation in the general sessions and workshops is limited to those who have paid the full registration fee to attend the conference.

MEETING ATTIRE: The attire for this conference is business casual.

IMPORTANT DATES

Early Registration Fee Deadline: **January 30**

Hotel Reservation Deadline: **January 30**

Cancellation Deadline: **February 4**

CONTINUING EDUCATION CREDIT

LIMRA, in conjunction with the Society of Financial Service Professionals, is pleased to inform you that attendance at any of the workshop sessions will qualify interested individuals for one PACE credit per session. A certification form will be available at the registration desk.

HOTEL INFORMATION



TAMPA MARRIOTT WATER STREET

505 Water Street

Tampa, FL 33602

Reservations by Phone: 1.888.789.3090
(mention the LIMRA Distribution Conference)

Make your reservations by **January 30, 2020** in order to receive the group rate of **\$269.00 single/double (plus applicable sales taxes)**. Requests **after January 30, 2020** will be accepted on the basis of rate and space availability.

Extend your stay? The group guest room rate will be offered three days prior to the meeting dates subject to availability at the time of your reservation. You may need to call the hotel directly to book the extra nights.

Check in: 4:00 p.m./Check out: 12:00 p.m.



Thank You to Our Committee Members

For their service and dedication in crafting an outstanding program.

For complete committee listings, please visit our online event page at:
<http://www.limra.com/distributionconf/>

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