



October 8–10  
Orlando, FL



**ACLI Annual Conference**

**2017**

***MOMENTUM!***

**FINAL PROGRAM**

AMERICAN COUNCIL OF LIFE INSURERS



Investment Management

Insurance Strategy

Specialized Client Service

Insurance Infrastructure

Goldman  
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**Asset  
Management**

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## Welcome to ACLI's 2017 Annual Conference—*MOMENTUM!*

Thank you for joining ACLI's 2017 Annual Conference.

Our industry faces a dynamic political environment in Washington, a new frontier in technology, and disruption in the United States and around the globe. This year the Annual Conference, with its theme of *Momentum*, explores ideas and circumstances that create movement in our industry. We hope that the conference will challenge your thinking, introduce innovative ideas, and offer insights as to how the rapidly evolving world will shape our industry.

We encourage you to engage in the sessions and network with your colleagues. Seize the opportunity to step outside day-to-day work challenges and consider the dynamic environments in which our industry operates.

Momentum can be a powerful force for positive change. The issue before us is how best to direct and harness momentum to deliver on the promises we've made to the 75 million Americans who rely on our products for financial security, peace of mind, and dignity of life.

Sincerely,



Pete Schaefer  
President & CEO  
Hannover Re



Governor Dirk Kempthorne  
President & CEO  
American Council of Life Insurers

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# GENERAL INFORMATION



## LOEWS SAPPHIRE FALLS RESORT

6601 Adventure Way  
Orlando, Florida, 32819  
Phone: (407) 503-5000

## REGISTRATION DESK

Grand Caribbean Ballroom Foyer, 4<sup>th</sup> Floor, Lobby Level

<b>Sunday, October 8</b>	8:00 am–5:00 pm
<b>Monday, October 9</b>	7:00 am–5:00 pm
<b>Tuesday, October 10</b>	7:00 am–2:00 pm

## EXHIBITOR MARKETPLACE

Grand Caribbean Ballroom 7, 4<sup>th</sup> Floor, Lobby Level

<b>Sunday Reception</b>	5:30–7:00 pm
<b>Monday Ice Cream Social</b>	3:00–4:00 pm
<b>Monday Reception</b>	5:00–7:00 pm

## NAME BADGES

Wear the color-coded name badge for admission to all sessions, social functions, and the Exhibitor Marketplace. Please return the badge to the registration desk at the end of the conference.

**Speakers:** White badge, black ribbon

**Registrants:** White badge

**Current Board Members:** White badge, white ribbon

**Press:** Green badge, white ribbon

**Exhibitors:** White badge, yellow ribbon

**Sponsors:** White badge, light blue ribbon

**Staff:** White badge, burgundy ribbon

## ATTIRE

Business casual unless otherwise noted.

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# Strategic Insight

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# ADVISORY COMMITTEE/ ACCREDITATION/ANTITRUST STATEMENT

## ADVISORY COMMITTEE

### COMMITTEE CHAIR

**Steven Najjar**  
Hannover Re

### MEMBERS

**Richard Braun, MD**  
SCOR Global Life Americas

**Jeffery Grubbe, MD**  
Allstate

**John F. Guyot**  
Security Benefit Life  
Insurance Company

**Jerry Hitpas**  
Trustmark Companies

**David Kuplic**  
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**Sharon Pacheco**  
Pacific Life Insurance Company

**Jeff Poulin**  
Canada Life Reinsurance

**Tracy Rich**  
The Guardian

**Cynthia Tidwell**  
Royal Neighbors of America

### ACLI MEMBERS

**Governor Dirk Kempthorne**  
American Council of Life Insurers

**Linda Cunningham**  
American Council of Life Insurers

**David Turner**  
American Council of Life Insurers

## ACCREDITATION

**Program Level:** This program will build on basic skills in order to relate fundamental principles and skills to practical situations and extend them to a broader range of applications. This level is for participants with exposure to the subjects.

**Learning Objectives:** Upon completion, participants will better understand: the new Best's Credit Rating Methodology Output; practical impact of Brexit on insurers and steps they should consider taking to preserve their trading rights in Europe after Brexit; proposed NAIC changes in capital factors for fixed income securities; the future of growth, inflation and rates; a better understanding of the current environment for M&A activity in the life insurance industry; as well as strategies and benefits of increased exposure to certain non-traditional and alternative asset classes.

**Program Prerequisites/Advance Preparation:**  
No advanced prerequisite or preparation is required.

**Instructional Method:** All presentations are group-live with instructor in room with participants. Recommended CPE Credits 7.5 hours.\* Sponsored activities are measured by program length, with one 50-minute period equal to one CPE credit. One-half CPE credit increments (equal to 25 minutes) are permitted after the first credit has been earned in a given learning activity.

## ANTITRUST STATEMENT

The American Council of Life Insurers is committed to adhering strictly to the letter and spirit of the antitrust laws. Meetings conducted under the ACLI's auspices are designated solely to provide a forum for the expression of various points of view on topics described in the agenda. Under no circumstances shall ACLI meetings be used as a means for competing companies to reach any understanding, expressed or implied, which tends to restrict competition, or in any way, to impair the ability of members to exercise independent business judgment regarding matters affecting competition.

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## Sunday, October 8

8:30–10:00 am **FORUM 500 SECTION BOARD OF GOVERNORS MEETING** (ACLI members only)  
Grand Caribbean Ballroom 1, 4<sup>th</sup> Floor, Lobby Level

8:45–10:00 am **FORUM 500 CONTINENTAL BREAKFAST**  
Outside Grand Caribbean Ballroom 2, 4<sup>th</sup> Floor, Lobby Level

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10:00 am–12:00 pm **FORUM 500 GENERAL SESSION**  
Grand Caribbean Ballroom 2, 4<sup>th</sup> Floor, Lobby Level



**Poulin**



**Maurer**

### **The Re-evolution of Financial Services Regulation: What's in Store for Life Insurance Companies**

The Chair of the powerful NAIC Receivership and Insolvency Task Force, Kristine Maurer, will share her insights on key issues involving financial regulation of life insurers, such as principle based reserving, guaranty association coverage for long-term care insurance, and risk-based capital issues of importance to smaller life insurers.

Moderator: **Jeff Poulin**, Chief Executive Officer, Canada Life Re

Speaker: **Kristine Maurer**, Assistant Director, Division of Insurance, New Jersey Department of Banking and Insurance



**Gandhi**



**Hale**

### **InsurTech and the Future of Insurance: A Conversation with Jamie Hale**

This session will feature a one-on-one conversation with Jamie Hale, CEO of Ladder Life. Ladder Life is an innovative company that provides instant, simple, and smart life insurance solutions. The conversation will revolve around innovation in the life insurance space and what challenges life insurers face in the future.

Speakers: **Jigar Gandhi**, Counsel, ACLI; **Jamie Hale**, Chief Executive Officer & Co-Founder, Ladder Life

10:15 am–1:45 pm **ACLI BOARD COMMITTEE MEETINGS** (ACLI members only)  
Grand Caribbean Ballrooms 8–10; 11–12, 4<sup>th</sup> Floor, Lobby Level

11:30 am–1:45 pm **LUNCHEON WITH JESSICA BUCHANAN**  
Kingston Hall, 1<sup>st</sup> Floor



**Buchanan**

When humanitarian aid worker Jessica Buchanan was kidnapped in Somalia and later rescued by SEAL Team Six, her story caught the attention of the world. Now she is a New York Times bestselling author of *Impossible Odds: The Kidnapping of Jessica Buchanan and Her Dramatic Rescue by SEAL Team Six*. Buchanan will share her first-hand experience in learning that the human spirit is impenetrable. Whatever obstacles or challenges lie in our path, if we dig deep to find the strength and fortitude, there is help for any situation no matter how impossible the odds.

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3:30–5:30 pm **ACLI BOARD OF DIRECTORS MEETING** (ACLI members only)  
Grand Caribbean Ballroom 3–5, 4<sup>th</sup> Floor, Lobby Level





# PROGRAM

## Sunday, October 8 (cont.)

5:00–5:45 pm

**REINSURANCE RECEPTION** (by invitation only)

Cayman Court, 1<sup>st</sup> Floor

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5:30–7:00 pm

**WELCOME RECEPTION AND EXHIBITOR MARKETPLACE OPENING**

Grand Caribbean Ballroom 7, 4<sup>th</sup> Floor, Lobby Level

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6:30–9:30 pm

**BOARD DINNER** (by invitation only)

BiCE Ristorante

## Monday, October 9

7:15–8:15 am

**CONTINENTAL BREAKFAST**

Grand Caribbean Ballroom Foyer 6–7, 4<sup>th</sup> Floor, Lobby Level

*Sponsored by*

**RGA**

7:30–8:15 am

**HOT ISSUE BREAKFAST–RATINGS OUTLOOK FOR LIFE INSURERS**

Kingston Hall, 1<sup>st</sup> Floor

Carmi Margalit, Analytical Manager for North America Life Insurance Ratings at S&P Global Ratings, will present and discuss the key factors underlying the ratings of U.S. and Canadian life insurance companies and how developments in the market, the regulatory environment and technology may, or may not, impact insurers' ratings going forward.

Speaker: **Carmi Margalit**, Senior Director & Analytical Manager, North America Life Insurance Ratings, S&P Global Ratings

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Ratings

8:30–9:30 am

**GENERAL SESSION**

Grand Caribbean Ballroom 6, 4<sup>th</sup> Floor, Lobby Level

**Emcee-Welcome Remarks**

**Ron Insana**, Senior Analyst, CNBC, and Financial Industry Expert

**President's Perspective**

**Governor Dirk Kempthorne**, President & Chief Executive Officer, ACLI

**Chairman's Perspective**

**Pete Schaefer**, President & Chief Executive Officer, Hannover Re

**Annual Business Meeting and Elections**



Insana



Kempthorne



Schaefer

## Monday, October 9 (cont.)

9:30–10:15 am



### WHAT'S NEXT FOR OUR DEMOCRACY

Grand Caribbean Ballroom 6, 4<sup>th</sup> Floor, Lobby Level

Former Speaker of the House John Boehner is uniquely positioned to discuss the future of the United States under a new White House and a new Congress. He was House Speaker for nearly five years and led the House Republican Conference for nearly a decade during some of the most tumultuous times in our country's political history. Speaker Boehner understands the challenges and opportunities facing President Trump, Vice President Mike Pence, White House Chief of Staff John Kelly, House Speaker Paul Ryan, Senate Majority Leader Mitch McConnell and many others who will set the course in Washington, D.C. in 2017 and beyond. Speaker Boehner provides unmatched authority on the dynamics facing the current generation of American leaders. Gregarious, insightful, candid and level-headed, Boehner is respected by Republicans and Democrats alike for his efforts to put the country first and find common ground without compromising on principles during his time as the highest-ranking Republican elected official in America.

Speaker: **The Honorable John Boehner**, Former Speaker, US House of Representatives

10:15–10:30 am

### REFRESHMENT BREAK

Grand Caribbean Ballroom Foyer, 4<sup>th</sup> Floor, Lobby Level

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10:30 am–12:00 pm

### CONCURRENT SESSIONS

Concurrent Session 1—*Legal/Compliance*

#### ELEVATED EXPECTATIONS, ELEVATED RISKS AND ELEVATED OPPORTUNITY: PREPARING FOR INCREASED CYBERSECURITY REGULATION, RISKS, AND OPPORTUNITY

Grand Caribbean Ballroom 3–4, 4<sup>th</sup> Floor, Lobby Level

Just as cyber threats are imminent to all industries, so are cybersecurity regulations. In the insurance industry, New York State's Department of Financial Services' core requirements became effective in August, and the first certifications requirements are due in February 2018. At the same time, the Internet of Things is making its way into everything from medical devices and cars, to coffee makers and refrigerators. The expansion brings big opportunity for cyber insurance. Big Data — particularly of the kind that insurers handle — will help deliver better, scalable and more profitable insurance products. But reliance on big data will also increase cybersecurity risk, requiring sound planning and a systemic approach to risk mitigation. Is the industry ready?

This presentation will explore the risks facing the insurance industry, the elevated regulatory environment at the state and federal level, and the unique business opportunities available.

Moderator: **Michael Bahar**, Partner, Eversheds Sutherland (US) LLP

Speakers: **Nicole Becher**, Manager of Offensive Security, CipherTechs;  
**Erez Liebermann**, Vice President, Corporate Counsel, Prudential; **Alexander F.L. Sand**, Associate, Eversheds Sutherland (US) LLP



## Monday, October 9 (cont.)

10:30 am–12:00 pm **CONCURRENT SESSIONS (CONT.)**

Concurrent Session 2—*Investment/Financial*

### **BREXIT IMPACT**

Grand Caribbean Ballroom 10–11, 4<sup>th</sup> Floor, Lobby Level

The impact of Brexit will stretch around the globe. This session will discuss the practical impact of Brexit on insurers, as well as steps insurers should consider taking now to preserve their trading rights in Europe after Brexit.

Moderator: **William Marcoux**, Partner, DLA Piper LLP

Speakers: **Jonathan de Beer**, Senior Adviser to the Director General, Association of British Insurers (ABI); **Anne Melissa Dowling**, Former Illinois Director of Insurance; **Melanie James**, Partner, DLA Piper LLP

Concurrent Session 3—*Reinsurance*

### **ACCELERATING CHANGE INTO OPPORTUNITIES**

Grand Caribbean Ballroom 2, 4<sup>th</sup> Floor, Lobby Level

Reinsurer CEOs will share their insights into opportunities for direct writers as the pace of change keeps accelerating. Topics could include adapting to changing consumer needs and expectations, building the talent pool, embracing data and technology, and adapting to regulatory change.

Moderator: **Mike DeKoning**, President & Chief Executive Officer, Munich Re

Speakers: **JC Brueckner**, Chief Executive Officer, SCOR; **Mike Emerson**, Executive Vice President & Head, U.S. & L/S American Markets, RGA; **Jeff Poulin**, Chief Executive Officer, Canada Life Re; **Neil Sprackling**, President, U.S. Businesses, Swiss Re

Concurrent Session 4

### **PREDICTIVE ANALYTICS**

Grand Caribbean Ballroom 8–9, 4<sup>th</sup> Floor, Lobby Level

This session will discuss the subject of Predictive Analytics and provide a survey of a range of current uses and applications within the insurance industry. We will discuss the interesting ways new data sources and analytics are being used to support how insurance business is managed today, as well as trends for the future.

Speakers: **Eric Carlson**, Life Actuary, Milliman IntelliScript; **Sam Nandi**, Principal & Consulting Actuary, Milliman

12:15–1:45 pm



**Holtz**

### **LUNCHEON—GAME PLAN FOR SUCCESS**

Grand Caribbean Ballroom 6, 4<sup>th</sup> Floor, Lobby Level

Lou Holtz is one of the most successful college football coaches of all time, and he knows game plans transcend athletics. He'll share a game plan for success to help your team and our industry excel.

Speaker: **Lou Holtz**, Legendary Football Coach and Analyst, ESPN (2004–2015)

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### **LIFE HAPPENS PRESENTATION**

There are countless examples of people whose lives have been forever changed by circumstances beyond their control. Representatives from Life Happens will share real life stories of how life, disability, and long-term care insurance made a difference when people needed it the most.

## Monday, October 9 (cont.)

2:00–3:00 pm

### CONCURRENT SESSIONS

Concurrent Session 1—*Legal/Compliance*

#### **INSURTECH: TRANSFORMING THE CUSTOMER EXPERIENCE**

Grand Caribbean Ballroom 3–4, 4<sup>th</sup> Floor, Lobby Level

InsurTech is rapidly changing insurance. How can we harness its disruptive powers? This session will discuss emerging trends in innovation and technology and its impact and opportunities for the insurance sector.

Speaker: **Raj Chakraborty**, Executive Vice President & Chief Digital Officer, Lincoln Financial Group

Concurrent Session 2—*Investment/Financial*

#### **CREDIT CYCLE AND INVESTMENT ENVIRONMENT**

Grand Caribbean Ballroom 10–11, 4<sup>th</sup> Floor, Lobby Level

In this session we will explore how US Life insurers are managing in a late cycle tight credit spread flat yield curve environment. In addition, we will cover the investment implications of the latest changes in FASB accounting guidance for equities and derivatives and the proposed changes to NAIC capital factors.

Speaker: **Mike Siegel**, Global Head, GSAM Insurance Asset Management

Concurrent Session 3

#### **WHEN WOMEN THRIVE, INSURERS THRIVE**

Grand Caribbean Ballroom 2, 4<sup>th</sup> Floor, Lobby Level

This session will provide an overview of the world's most comprehensive report on women in the workplace, with a special focus on insurer data. The overview includes 10 year forecasts, talent pipeline analysis, best practices, and insights into the key levers to consider for an effective gender diversity strategy.

Speaker: **Carole Jackson**, Principal, Mercer

3:00–3:30 pm

#### **ICE CREAM SOCIAL IN EXHIBIT MARKETPLACE**

Grand Caribbean Ballroom 7, 4<sup>th</sup> Floor, Lobby Level

3:30–4:30 pm

### CONCURRENT SESSIONS

Concurrent Session 1—*Legal/Compliance*

#### **"BULLET-PROOFING" YOUR QUALIFIED PLAN SALES**

Grand Caribbean Ballroom 3–4, 4<sup>th</sup> Floor, Lobby Level

This panel will discuss ways you can avoid potential pitfalls related to the DOL Fiduciary Rule, new state fiduciary initiatives, and the latest putative class action litigation against pension plans, fiduciaries, and providers when selling insurance products and mutual funds in the qualified plan market.

Speakers: **Richard Choi**, Shareholder, Carlton Fields Jorden Burt; **Jim Jorden**, Chair, Life Insurance Industry Group, Carlton Fields Jorden Burt; **Steve Toretto**, Vice President & Associate General Counsel, Pacific Life Insurance Company; **Richard A. Turner**, Vice President & Associate General Counsel, AIG Consumer

Concurrent Session 2—*Investment/Financial*

#### **WHAT'S THE BEST THAT COULD HAPPEN?**

Grand Caribbean Ballroom 10–11, 4<sup>th</sup> Floor, Lobby Level

Does the world work the way we think it does? Do low rates boost growth or limit it? Are we really stagnating? Does a rising rate environment have to be bad for risk assets? Doesn't this cycle have to end? We explore why the experts have been wrong and what that might mean for the future of growth, inflation, and rates.

Speaker: **Drew Matus**, Managing Director, Chief Market Strategist, MetLife Investments



## Monday, October 9 (cont.)

3:30–4:30 pm

### CONCURRENT SESSIONS (CONT.)

Concurrent Session 3—*International*

#### REGULATORY SANDBOXES: LESSONS FOR U.S. AND AROUND THE WORLD

Grand Caribbean Ballroom 2, 4<sup>th</sup> Floor, Lobby Level

This session will include a discussion around successful regulatory trends and fast-tracks from around the world.

Speakers: **Paige Freeman**, Senior Vice President, General Counsel & Secretary, Munich Re; **Ben Seessel**, Shareholder, Carlton Fields Jordan Burt

5:00–7:00 pm

### RECEPTION IN EXHIBIT MARKETPLACE

Grand Caribbean Ballroom 7, 4<sup>th</sup> Floor, Lobby Level

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Evening

### PAC RECEPTION (by invitation only)

Universal's Islands of Adventure

ACLIPAC



## Tuesday, October 10

7:15–8:15 am

### CONTINENTAL BREAKFAST

Grand Caribbean Ballroom Foyer, 4<sup>th</sup> Floor, Lobby Level

Sponsored by

**Debevoise  
& Plimpton**

7:30–8:15 am

### HOT ISSUE BREAKFAST

Kingston Hall, 1<sup>st</sup> Floor

The new Best's Credit Rating Methodology (BCRM) has been in development for two years and will go live in the fall of 2017. This session will discuss the new methodology output, with a particular focus on U.S. life/annuity industry. This presentation will include a discussion on the key rating factors - balance sheet strength, operating performance, business profile and ERM in an effort to help companies better understand where they stand relative to rated peers."

Speakers: **Ken Johnson**, Senior Director, A.M. Best; **Edward Kohlberg**, Associate Director, A.M. Best

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## Tuesday, October 10 (cont.)

8:30–9:30 am

### GENERAL SESSION

Grand Caribbean Ballroom 6, 4<sup>th</sup> Floor, Lobby Level

#### Tax Reform–Political & Legislative Outlook



Birnbaum

Jeffrey Birnbaum, co-author of the book, “Showdown at Gucci Gulch,” will provide his perspective on the 1986 tax reform effort and how it compares with the current state of tax reform underway inside the Beltway.

Speaker: **Jeffrey Birnbaum**, President, BGR Public Relations

9:45–10:45 am

### CONCURRENT SESSIONS

Concurrent Session 1—*Legal/Compliance*

#### BLOCKCHAIN TECHNOLOGY

Grand Caribbean Ballroom 3–4, 4<sup>th</sup> Floor, Lobby Level

The emergence of blockchain technology has many people talking about its potential influence on industries. This session will cover blockchain technology’s impact on the insurance industry.

Speakers: **Farron Blanc**, Vice President, Innovation Studio, RGA; **Kris Kersey**, Director, PricewaterhouseCoopers LLP; **Marilyn Lion**, Partner, Debevoise & Plimpton LLP

Concurrent Session 2—*Investment/Financial*

#### DEVELOPMENTS AND TRENDS IN LIFE INSURANCE MERGERS & ACQUISITIONS

Grand Caribbean Ballroom 10–11, 4<sup>th</sup> Floor, Lobby Level

This session will provide an assessment of the current environment for M&A activity in the life insurance industry, including a survey of the economic, regulatory, tax and political factors that are contributing to M&A activity. It will also focus on the buyers who are interested in M&A in the life insurance sector, including run-off specialists, private equity and foreign entities, an appraisal of the considerations in getting deals done with non-traditional buyers, and the proposed federal tax reform initiatives that may affect M&A activity. The panel will also look ahead at the expected level of activity in the M&A market over the next year.

Moderator: **Alexander Dye**, Partner, Corporate & Financial Services, Willkie Farr & Gallagher, LLP

Speakers: **Eric Goldstein**, Managing Director, Head of Insurance M&A, J.P. Morgan Securities LLC; **Adam Hodes**, Executive Vice President-Corporate Development-Mergers & Acquisitions, MetLife, Inc.; **Gavin McFarland**, Head of North America Financial Institutions Group, Morgan Stanley; **Christopher Peters**, Partner & Chair, Tax Department, Willkie Farr & Gallagher, LLP

Concurrent Session 3—*Medical*

#### TWO FACTORS THREATENING MORTALITY IMPROVEMENT: THE OBESITY EPIDEMIC AND THE OPIOID CRISIS

Grand Caribbean Ballroom 2, 4<sup>th</sup> Floor, Lobby Level

Mortality rates had been consistently improving in the U.S. for over 70 years. However, toward the end of 2015, it was noted that this improvement had stalled. This session will cover two major threats to improving mortality in the U.S. We will discuss the causes, complications and possible solutions to these threats to longevity.

Speaker: **Richard Braun**, Vice President & Chief Medical Officer, Reinsurance Underwriting, SCOR Global Life Americas



## Tuesday, October 10 (cont.)

10:45–11:00 am

### REFRESHMENT BREAK

Grand Caribbean Ballroom Foyer, 4<sup>th</sup> Floor, Lobby Level

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11:00 am–12:00 pm

### CONCURRENT SESSIONS

Concurrent Session 1—*Legal/Compliance*

#### FEDERAL REGULATION

Grand Caribbean Ballroom 3–4, 4<sup>th</sup> Floor, Lobby Level

There are many developments regarding federal regulated entities including: investment advisers, mutual funds, broker-dealers, and SIFIs. A panel will discuss these issues, as well as liquidity risk management, SEC enforcement, fiduciary standards for brokers, and developments in SIFI designations.

Moderator: **Jeffrey Poretz**, Partner, Dechert LLP

Speakers: **Catherine Botticelli**, Partner, Dechert LLP ; **Robert Plaze**, Partner, Proskauer Rose LLP; **Carl Wilkerson**, Vice President & Chief Counsel, Securities & Litigation, ACLI

Concurrent Session 2—*Investment/Financial*

#### THE NEW INVESTMENT ENVIRONMENT FOR INSURERS: CHALLENGES & OPPORTUNITIES

Grand Caribbean Ballroom 10–11, 4<sup>th</sup> Floor, Lobby Level

The continuing low interest rate environment has taken its toll on investment results for the life insurance industry. Gross book yield decreased once again for the life-annuity industry. Insurers have been searching for levers to improve their returns, and yet, the interest rate environment has relentlessly pulled yields down. Some insurers have managed to slow the speed of decline, but their portfolio yields still decrease. During this session, Conning will share actual strategies implemented by top-performing companies, as well as potential benefits of increased exposure to certain non-traditional and alternative asset classes. It will also address the potential impact on these assets as a result of changes in regulatory and rating changes in the near and long term.

Speaker: **Daniel Mainolfi**, Managing Director & Portfolio Manager, Conning

Concurrent Session 3

#### THIS IS HOW WE DO IT (FOR NOW)–EMBRACING INNOVATION IN THE LIFE INDUSTRY, TODAY AND TOMORROW

Grand Caribbean Ballroom 2, 4<sup>th</sup> Floor, Lobby Level

The tools, data, and analytics being leveraged today are just the tip of the proverbial iceberg and only offer a glimpse of how we'll do business tomorrow. The session will explore how today's proven successes and new innovations will pave the way to increase market share, enhance the customer experience, and drive results.

Speaker: **Elliott Wallace**, Vice President & General Manager, Life Insurance Vertical, LexisNexis Risk Solutions

12:15–2:00 pm



**Halperin**

### **LUNCHEON–POLITICAL OUTLOOK**

Grand Caribbean Ballroom 6, 4<sup>th</sup> Floor, Lobby Level

With unmatched sources at the senior levels of both political parties and his ability to spotlight the substance, drama and consequence of modern politics, Mark Halperin provides audiences with his trademark rigorous, non-partisan analysis of policy, the political arena, the media and the implications of the 2016 presidential election, the Trump Administration, and the future of American politics.

Speaker: **Mark Halperin**, Creator, Executive Producer, and Co-Host, Showtime's *The Circus*; Senior Political Analyst, NBC News and MSNBC; and Co-author, New York Times Best Sellers *Game Change* and *Double Down: Game Change 2012*

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2:00–3:00 pm

### **LEGISLATIVE AND REGULATORY CHALLENGES**

Grand Caribbean Ballroom 3–4, 4<sup>th</sup> Floor, Lobby Level

ACLI's team will provide a review of the most pressing legislative and regulatory challenges facing the industry today.

Speakers: **Pete Bautz**, Senior Vice President, Taxes & Retirement Security, ACLI; **Alane Dent**, Acting Senior Vice President, Federal Relations, ACLI; **Kate Kiernan**, Vice President, Chief Counsel & Deputy, State Relations, ACLI; **Julie Spiezio**, Senior Vice President & General Counsel, ACLI



# SPOUSE/GUEST PROGRAM

## Sunday, October 8

- 9:15–11:30 am **NATURE WALK IN THE TIBET BUTLER PRESERVE**  
Tibet-Butler Preserve's diverse natural areas include swamps, marshes, and a variety of wildlife including rare species of animals and plants. Join us as we learn more about the important role of fire in Florida's ecosystem.  
Please meet in the hotel lobby at 9:15 am.  
Transportation will depart at 9:30 am.
- 12:15–1:45 pm **LUNCHEON WITH JESSICA BUCHANAN**  
Kingston Hall, 1<sup>st</sup> Floor  
When humanitarian aid worker Jessica Buchanan was kidnapped in Somalia and later rescued by SEAL Team Six, her story caught the attention of the world. Now she is a New York Times bestselling author of Impossible Odds: The Kidnapping of Jessica Buchanan and Her Dramatic Rescue by SEAL Team Six. Buchanan will share her first-hand experience in learning that the human spirit is impenetrable. Whatever obstacles or challenges lie in our path, if we dig deep to find the strength and fortitude, there is help for any situation no matter how impossible the odds.
- 2:00–4:45 pm **HIGHLIGHTS TOUR OF THE CHARLES HOSMER MORSE MUSEUM OF AMERICAN ART**  
Join us for a private docent-led tour of the Morse Museum. The museum has the world's most comprehensive collection of works by Louis Comfort Tiffany.  
Please meet in the hotel lobby at 2:00 pm.  
Transportation will depart at 2:15 pm.
- 2:00–5:00 pm **SPOUSE/GUEST HOSPITALITY SUITE OPEN**  
St. Croix 3, 4<sup>th</sup> Floor, Lobby Level  
Stop by to visit, find information on the sights and sounds of Orlando, and enjoy refreshments.
- 5:30–7:00 pm **WELCOME RECEPTION AND EXHIBITOR MARKETPLACE OPENING**  
Grand Caribbean Ballroom 7, 4<sup>th</sup> Floor, Lobby Level
- 6:30–9:30 pm **BOARD DINNER** (by invitation only)  
BiCE Ristorante

## Monday, October 9

- 7:30 am–5:00 pm **SPOUSE/GUEST HOSPITALITY SUITE OPEN**  
St. Croix 3, 4<sup>th</sup> Floor, Lobby Level  
Breakfast will be available from 7:30–9:00 am. Afternoon refreshments from 3:00–5:00 pm
- 7:30–8:15 am **HOT ISSUE BREAKFAST**  
Kingston Hall, 1<sup>st</sup> Floor
- 8:30–9:30 am **GENERAL SESSION**  
Grand Caribbean Ballroom 6, 4<sup>th</sup> Floor, Lobby Level  
**Emcee-Welcome Remarks**  
**Ron Insana**, Senior Analyst, CNBC, and Financial Industry Expert  
**President's Perspective**  
**Governor Dirk Kempthorne**, President & Chief Executive Officer, ACLI  
**Chairman's Perspective**  
**Pete Schaefer**, President & Chief Executive Officer, Hannover Re  
**Annual Business Meeting and Elections**

## Monday, October 9 (cont.)

9:30-10:15 am

### WHAT'S NEXT FOR OUR DEMOCRACY

Grand Caribbean Ballroom 6, 4<sup>th</sup> Floor, Lobby Level

Former Speaker of the House John Boehner is uniquely positioned to discuss the future of the United States under a new White House and a new Congress. He was House Speaker for nearly five years and led the House Republican Conference for nearly a decade during some of the most tumultuous times in our country's political history. Speaker Boehner understands the challenges and opportunities facing President Trump, Vice President Mike Pence, White House Chief of Staff John Kelly, House Speaker Paul Ryan, Senate Majority Leader Mitch McConnell and many others who will set the course in Washington, D.C. in 2017 and beyond. Speaker Boehner provides unmatched authority on the dynamics facing the current generation of American leaders. Gregarious, insightful, candid and level-headed, Boehner is respected by Republicans and Democrats alike for his efforts to put the country first and find common ground without compromising on principles during his time as the highest-ranking Republican elected official in America.

Speaker: **The Honorable John Boehner**, Former Speaker, US House of Representatives

10:15-10:30 am

### REFRESHMENT BREAK

Grand Caribbean Ballroom Foyer, 4<sup>th</sup> Floor, Lobby Level

12:15-1:45 pm

### LUNCHEON-GAME PLAN FOR SUCCESS

Grand Caribbean Ballroom 6, 4<sup>th</sup> Floor, Lobby Level

Lou Holtz is one of the most successful college football coaches of all time, and he knows game plans transcend athletics. He'll share a game plan for success to help your team and our industry excel.

Speaker: **Lou Holtz**, Legendary Football Coach and Analyst, ESPN (2004-2015)

3:00-3:30 pm

### ICE CREAM SOCIAL IN EXHIBIT MARKETPLACE

Grand Caribbean Ballroom 7, 4<sup>th</sup> Floor, Lobby Level

4:00-5:00 pm

### BOOK CLUB WITH A TWIST

St. Croix 3, 4<sup>th</sup> Floor, Lobby Level

Rather than everyone reading the same book and sharing thoughts and perspectives afterwards, come and share your latest favorite finds. What a fun way to learn about each other and discover current best-sellers that are worth the hype (or not!) and little-known treasures. We'll also have a special book for you to take home. Maybe it will become one of your favorites!

5:00-7:00 pm

### RECEPTION IN EXHIBIT MARKETPLACE

Grand Caribbean Ballroom 7, 4<sup>th</sup> Floor, Lobby Level

## Tuesday, October 10

8:15-11:30 am

### KAYAK ECO-TOUR AT SHINGLE CREEK

Shingle Creek is the headwaters of the Everglades. This beginning level guided tour starts and ends at The Paddling Center at Shingle Creek. Tour participants quickly enter an ecological gem that is rated one of the top paddling trails in Florida. Within 20 minutes you enter an old-growth cypress forest that is both serene and stunningly beautiful.

Please meet in the hotel lobby at 8:15 am.  
Transportation will depart at 8:30 am.

12:15-2:00 pm

### LUNCHEON-POLITICAL OUTLOOK

Grand Caribbean Ballroom 6, 4<sup>th</sup> Floor, Lobby Level

With unmatched sources at the senior levels of both political parties and his ability to spotlight the substance, drama and consequence of modern politics, Mark Halperin provides audiences with his trademark rigorous, non-partisan analysis of policy, the political arena, the media and the implications of the 2016 presidential election, the Trump Administration, and the future of American politics.

Speaker: **Mark Halperin**, Creator, Executive Producer, and Co-Host, Showtime's The Circus; Senior Political Analyst, NBC News and MSNBC; and Co-author, New York Times Best Sellers Game Change and Double Down: Game Change 2012



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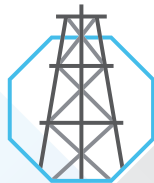
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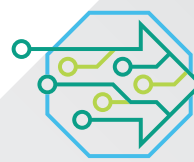
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## EXHIBITOR MARKETPLACE

Grand Caribbean Ballroom 7, 4<sup>th</sup> Floor, Lobby Level

**Sunday Reception** 5:30–7:00 pm  
**Monday Ice Cream Social** 3:00–3:30 pm  
**Monday Reception** 5:00–7:00 pm



Exhibitor	Booth #
A.M. Best	18
Accenture Life and Annuity Software	5
American Council of Life Insurers	26
BobTrak, Inc.	7
Brighthouse Financial, Inc.	21
Carlton Fields Jordan Burt	10
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Dechert LLP	25
Expense Reduction Analysts	19
Federal Home Loans Bank	14
Feel Good, Inc.	22
First Consulting & Administration, Inc.	2
Insurance Thought Leadership, Inc.	20
Intellect SEEC	8
Iowa Economic Development Authority	11
The Jacobson Group	16
Life Happens	3
M Benefit Solutions	9
Mercer	6
Milliman, Inc.	13
NAPHSIS	1
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RegEd	12
S&P Global Ratings	15
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Phone: (408) 590-9518  
Email: david.kelly@bobtrak.com

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Ross Bagshaw, Director

Phone: (817) 247-4158

Emails: [lynnhartung@gmail.com](mailto:lynnhartung@gmail.com); [rbagshaw@expensereduction.com](mailto:rbagshaw@expensereduction.com)

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Phone: (301) 563-6005

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February 17–20	<b>Medical Section Annual Meeting</b> The Vinoy Renaissance, St. Petersburg, FL
March 4–7	<b>ReFocus2018</b> Aria Resort, Las Vegas, NV
March 18–21	<b>Financial &amp; Investment Roundtable (FIR)</b> The Cloister at Sea Island, Sea Island, GA
April 8–10	<b>Genetics Symposium</b> Crystal City Marriott, Arlington, VA
April 9–11	<b>Life Insurance Conference</b> Marriott Chicago Downtown, Chicago, IL
May 6–8	<b>Forum 500 CEO Leadership Retreat</b> Silverado Resort, Napa, CA
June 11–13	<b>CEO Capitol Forum</b> ACLI/Hyatt Regency Washington on Capitol Hill, Washington, DC
June 15	<b>Board Meeting</b> ACLI/Hyatt Regency Washington on Capitol Hill, Washington, DC
July 11–13	<b>Compliance and Legal Sections Annual Meeting</b> The Greenbrier, White Sulphur Springs, WV
October 7–9	<b>Annual Conference</b> Renaissance Washington, DC, Downtown Washington, DC
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