

Life & Health Compliance Association Fall Meeting 2019

OCTOBER 23-25 | The Westin Alexandria Old Town
Alexandria, VA



AGENDA

(as of September 11, 2019)

WEDNESDAY, OCTOBER 23

- 1:30-5:30 PM **REGISTRATION**
- 2:00-3:15 PM **Executive Committee Meeting**
- 3:30-4:00 PM **New Attendees Workshop**
Vera Ray, Compliance Filing Director, Great American Insurance Group
- 4:00-4:30 PM **ACLI Legislative and Regulatory Affairs Overview***
Olivia Gillis, Vice President, Legislative and Regulatory Affairs, ACLI
Emily Wolf, Director, Legislative and Regulatory Affairs, ACLI
- 4:30-4:45 PM **REFRESHMENT BREAK**
- 4:45-5:30 PM **Interstate Insurance Compact****
Karen Schutter, Executive Director, Interstate Insurance Product Regulation Commission
- 5:30-6:30 PM **WELCOME RECEPTION**
- 6:30 PM **Evening Activities and Dinner**
On your own

THURSDAY, OCTOBER 24

- 7:30-5:00 PM **REGISTRATION**
- 7:30-8:30 AM **NETWORKING BREAKFAST**
- 8:30-8:50 AM **Welcome and Opening Remarks**
Susan K. Neely, President & CEO, ACLI
- Anti-Trust Statement**
George Cash, Senior Compliance Analyst, Protective Life
- 8:50-9:30 AM **Privacy Discussion**
Robbie Meyer, Vice President & Associate General Counsel, ACLI
Jigar D. Gandhi, Associate, Faegre Baker Daniels
- 9:30-9:45 AM **REFRESHMENT BREAK**
- 9:45-10:45 AM **Q&A Session 1- General and Privacy**
- 10:45-11:45 AM **Regulator Panel: Filing Issues and Tips*****
Regulators from DC, MD, and VA
Olivia Gillis, Vice President, Legislative & Regulatory Affairs, ACLI
- 12:00-1:30 PM **LUNCH WITH KEYNOTE SPEAKER**
Julie Mix McPeak, Shareholder, GreenbergTraurig



1:30-2:30 PM	Roundtable Discussion: Compliance Hot Topics Jan Graeber , Senior Health Actuary, ACLI Michael Lovendusky , Vice President & Associate General Counsel, ACLI Chuck Piacentini , Vice President, Insurance Regulation & Associate General Counsel, ACLI
2:30-3:15 PM	Q&A Session 2- Supplemental Product, Advertising, Market Conduct, and Genetic Testing
3:15-3:30 PM	REFRESHMENT BREAK
3:30-4:15 PM	Suitability Discussion: Insurance Company Products and Industry Innovation Laurie Lewis , Chief Life Compliance Officer, Amica Life Insurance Company
4:15-5:00 PM	Q&A Session 3- Suitability, Annuity, and NAIC
5:00-6:00 PM	NETWORKING RECEPTION
7:00 PM	Evening Activities and Dinner On your own

7:00-12:00 PM	REGISTRATION
7:00-8:00 AM	NETWORKING BREAKFAST
7:00-8:00 AM	EXECUTIVE COMMITTEE BREAKFAST MEETING
8:00-8:15 AM	Life & Health Compliance Association Announcements Executive Committee Report Invitation to Attend Next Meeting Vera Ray , Compliance Filing Director, Great American Insurance Group
8:15-9:15 AM	Insurance Industry Report: Past, Present, and Future Andrew Melnyk , Vice President, Research & Chief Economist, ACLI
9:15-10:00 AM	CSO Mortality Tables Brian Bayerle , Senior Actuary, ACLI
10:00-10:15 AM	REFRESHMENT BREAK
10:15-11:15 AM	Ethics Training for Compliance Professionals Kelly Ireland , Vice President, Compliance & Ethics, CEFLI
11:15-12:00 PM	Q&A Session 4- Overflow Questions
12:00 PM	ADJOURNMENT
12:00 PM	HOTEL CHECK-OUT

* Individual consultations available with ACLI Legislative & Regulatory Affairs throughout conference.
 ** Individual consultations available with Karen Schutter throughout conference.
 *** Individual consultations available with regulators Thursday afternoon.