

# ACLI ANNUAL CONFERENCE 2024

September 25–27 | Swissôtel Chicago | Chicago, IL

ACTION TO IMPACT



ACLI



## CONFERENCE PROGRAM

As of 7/23/2024 - Please note: Schedule is subject to change.

### WEDNESDAY, SEPTEMBER 25

- 8:00 AM–5:00 PM **Registration**
- 8:30–10:00 AM **Forum 500 Section Board of Governors Meeting**  
*(ACLI members only, breakfast served)*
- 10:30 AM–3:00 PM **ACLI Board Committee Meetings** *(ACLI members only)*
- 10:30–11:45 AM **CEO Steering Committee on Prudential Issues**
- 12:00–1:15 PM **CEO Steering Committee on Consumer Issues** *(with buffet lunch)*
- 1:30–3:00 PM **CEO Steering Committee on Taxation**
- 3:00–4:45 PM **ACLI Board of Directors Meeting** *(ACLI members only)*
- 5:00–5:30 PM **Rising Leader Reception** *(Invitation only)*
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- 5:30–6:30 PM **Welcome Reception**  
Sponsored by:  

- 6:30 –9:00 PM **ACLI Board of Directors Dinner** *(Invitation only)*

### THURSDAY, SEPTEMBER 26

- 7:15–8:15 AM **Rising Leader Program Breakfast** *(Invitation only)*
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- 7:30–8:15 AM **Networking Breakfast**  
Sponsored by:  


8:35–9:30 AM

**Opening Remarks & Perspectives**

**Emcee-Welcome Remarks**

**Jillian Froment**, Executive Vice President & General Counsel, American Council of Life Insurers



**President’s Perspective**

**Susan Neely**, President & Chief Executive Officer, American Council of Life Insurers



**Chair’s Perspective**

**Paul Quaranto**, Chairman, Chief Executive Officer & President, Boston Mutual Life Insurance Company



**Gavel Exchange**

**Rich Bielen**, President & Chief Executive Officer, Protective Life Corporation



9:30–10:15 AM

**General Session: Leadership and Election Insights with Speaker McCarthy**

55th Speaker of the House Kevin McCarthy believes in the possibility about rebuilding, restoring, and renewing America. In this fascinating discussion, McCarthy will recount his experiences in Congress and reflect on his decade and a half in public office, sharing stories of his time in both state and federal leadership. He will share his behind-the-scenes perspectives on political trends, explaining the nuances of today’s headlines, and breaking down what each development could mean for individuals, businesses, and industries.



Moderator:

**Paul Quaranto**, Chairman, Chief Executive Officer & President, Boston Mutual Life Insurance Company

Speaker:

**Kevin McCarthy**, 55<sup>th</sup> speaker of the US House of Representatives

10:15–10:45 AM

**Networking Refreshment Break**

10:45–11:45 AM

**Concurrent Sessions**

1. Finance/Investment Focus Session  
**Financial and Investment Outlook**  
Speakers TBA
2. Technology/ Trends Focus Session
3. Compliance / Legal Focus Session  
**ERISA Litigation: What You Need to Know**  
ERISA litigation continued to make headlines throughout 2023. Hear panelists discuss the most significant issues and trends in ERISA litigation from the past year.  
Speaker:  
**Glenn Merten**, Partner, Faegre Drinker  
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4. Industry Issues Focus Session  
**Rethinking Guidelines: Medical Underwriting in a Time of Exponential Data Growth**  
In this session, the speakers will explore underwriting with today’s technology. The session will describe the collision of new data streams (prescription data, medical billing and diagnostic codes, EHR, etc.) and tools (rules engines, predictive models) with traditional underwriting guidelines, explain why more data, more comprehensive assessment, and sophisticated modeling are prompting carriers to reconsider legacy guideline-driven underwriting, and explore the concept of a new underwriting model more compatible with digital insight.  
Moderator:  
**Dave Rengachary, MD**, Senior Vice President, Head of Underwriting, RGA

Speaker:  
**Jenna Farris**, Director and Actuary, Milliman IntelliScript

12:00–1:45 PM

### Luncheon Session

#### ACLI Rising Leader Program Class of 2024 Graduation Political Action Committee (PAC) Update

##### General Session: Up From Nothing

Facing a challenging economy, too many Americans despair of improving their lives. But John Hope Bryant insists that America is still the Land of Opportunity. His story revives the forgotten narrative of the American Dream. It's about our beginnings as a nation of go-getters who believed they were winners before they won.



Using the inspiring story of his own rise from humble beginnings, and that of his parents and grandparents, Bryant shows how individually we can change our mindset from survivor to thriver to winner and move beyond just getting by or being financially independent to becoming wildly successful. Collectively, we need to become a nation of winners once again.

Speaker:

**John Hope Bryant**, Founder, Chairman, & CEO, Operation Hope

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**EVERSHEDS  
SUTHERLAND**

2:00–3:00 PM

### Concurrent Sessions:

#### 1. Finance/Investment Focus Session

##### **Cash Flow Testing of Reinsurance**

Panelists will review developments related to asset adequacy analysis for reinsurance ceded by life and annuity insurers exposed March 17, 2024, by the LATF for comments (“LATF Proposal”). The focus will be on the response of interested parties’ views of the LATF Proposal. Panelists will also address the management of counterparty credit risk by U.S. ceding insurers, other regulatory concerns raised by the NAIC and covered agreement issues.

Speakers:

**Brian Barrett**, Partner, Eversheds Sutherland

**Catherine Murphy**, Vice President & US Deputy Appointed Actuary, John Hancock Life Insurance Company

**Theresa Reznick**, Senior Vice President and Actuary, Everlake Life Insurance Company

#### 2. Technology/Trends Focus Session

#### 3. Compliance/Legal Focus Session

##### **Artificial Intelligence**

As the opportunities of Artificial Intelligence pushes our industry, this panel will explore the delicate balance between ethics, regulation and innovation. Panelists will be focused on sharing their perspectives on tackling some of the tougher challenges of how to balance governance vs innovation.

Moderator:

**Chad Eslinger**, Chief Ethics and Compliance Officer, Resolution Life US

Speakers:

**Sheila Burton**, Compliance Vice President, Athene

**Rebecca Gahete**, Deputy General Counsel, Chief Privacy Officer & Technology, Resolution Life US

**Aaron Witt**, Chief Digital & Data Officer, Vice President, Sammons Financial Group

#### 4. Industry Issues Focus Session

##### **The New Sound of Economic Power; Women’s Voices Reshaping Financial Security**

This session will focus on the evolving landscape of retirement planning for women, focusing on the impact of social media, influencer culture and more.

Moderator:

**Jessica Mancari**, Senior Vice President, Public Affairs, American Council of Life Insurers

Speakers:

**Zarifa Reynolds**, President & Chief Executive Officer, Royal Neighbors of America

**Marsha Barnes**, Personal Finance Expert, Commentator, Founder, The Finance Bar

3:00–3:30 PM

### **Milliman Moody Tongue Mixer**

Unwind and Connect at the Milliman Moody Tongue Mixer! Join us for a relaxed networking brewery break sponsored by Milliman. Enjoy locally crafted Chicago beer, delicious bar snacks, and mixed nuts in a casual atmosphere perfect for mingling and making connections. It's the ideal way to decompress from a busy day of sessions while enjoying Moody Tongue's renowned beers. Don't miss out on this unique networking opportunity!

4:30 – 6:00 PM

### **PAC Reception**

6:00 – 8:00 PM

## **ACLIPalooza**

Step into a new era of networking with ACLIPalooza! Inspired by Chicago's legendary Lollapalooza festival, join us for a unique reception experience where industry leaders converge for an unforgettable evening. Discover a vibrant atmosphere filled with heavy hors d'oeuvres, interactive food stations, and captivating entertainment. Engage in meaningful conversations on key industry issues while expanding your professional network amidst the energetic spirit of an ACLI inspired festival.

Sponsored by:



**FRIDAY, SEPTEMBER 27**

7:45 – 8:30 AM

### **Rising Leader Breakfast** *(Invitation only)*

Speaker:

**Blerina Uruci**, Chief U.S. Economist, T. Rowe Price

7:45–8:30 AM

### **Hot Issues Breakfast Session**

#### **The Annuity Market Soars - New Entrants Bring Capacity and Competition**

The fixed annuity market saw record sales in 2023, building on the strength of 2022. Join Ken Frino and Mike Porcelli from AM Best Ratings as they discuss the dynamics driving this market, the risks insurers face, and the future of the annuity product line. They will share their insights on what this product shift means for the portfolio of life and annuity insurers, as well as their thoughts about the interest rate environment that lies ahead for annuity writers.

Speakers:

**Ken Frino**, Managing Director, AM Best

**Mike Porcelli**, Senior Director, AM Best

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8:45–9:30 AM

**Conference Emcee- Friday**

**Jill Kozeny**, Executive Vice President & Chief Advocacy Officer, Public Affairs, American Council of Life Insurers



**General Session**

9:45–10:45 AM

**Concurrent Sessions:**

1. Finance/ Investment Focus Session

**Federal Home Loan Bank Update**

This session will discuss the FHFA report, expected regulatory activity or guidance next year, and the potential impact on life insurers.

Moderator:

**Paul Kangas**, Vice President, Financial Services & Principal Deputy, American Council of Life Insurers

Speakers:

**Adam Aderton**, Partner, Litigation, Willkie Farr & Gallagher LLP

**Ryan Donovan**, President & Chief Executive Officer, Council of Federal Home Loan Banks

**Michael Ericson**, President & Chief Executive Officer, Federal Home Loan Bank of Chicago

2. Technology/ Trends Focus Session

3. Compliance/ Legal Focus Session

10:45–11:00 AM

**Networking Refreshment Break**

11:00 AM–12:00 PM

**Concurrent Sessions:**

1. Finance/ Investment Focus Session

**Changing Regulatory Landscape for Life Insurer Investments**

This session will explore the insurance regulatory issues associated with new and complex investment structures involving life insurers, including the evolving changes in regulatory treatment of different types of investments by the National Association of Insurance Commissioners.

Speaker:

**Larry Hamilton**, Partner, Mayer Brown

2. Industry Issues Focus Session

3. Compliance/ Legal Focus Session

**Big Picture – Legislative and Political Landscape in 2025 Election**

Speakers:

**Kathleen Coulombe**, Senior Vice President, Federal Relations, American Council of Life Insurers

**Doug Sosnik**, Former Clinton White House Adviser

**Leah Walters**, Senior Vice President, State Relations, American Council of Life Insurers

12:15–1:30 PM

**Closing Luncheon**

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FIELDS**

**Life Happens Presentation**

1:30 PM

**Adjournment**