CONFERENCE PROGRAM

As of 9/25/2024 - Please note: Schedule is subject to change.

WEDNESDAY, SEPTEMBER 25

8:00 AM–5:00 PM **Registration**
Co-sponsored by:
AllianceBernstein faegre drinker

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**

3:30–4:45 PM **ACLI Board of Directors Meeting** *(ACLI members only)*

4:30–5:00 PM **ACLI Rising Leader Program Meet & Greet** *(Rising Leaders only)*

5:00-5:30 PM **Rising Leader Reception** *(Invitation only)*
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5:30–6:30 PM **Welcome Reception**
Sponsored by:
Global Atlantic FINANCIAL GROUP

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)*

Leading the Way: Leadership Lessons and Insights on Retirement and Healthy Aging with Surya Kolluri
During this breakfast session, hear from retirement and healthy aging thought leader, Surya Kolluri, Head of TIAA Institute. Surya will speak about his career and leadership lessons learned along the way, as well as share TIAA Institute's latest research findings on financial and longevity literacy and retirement planning.
Speaker:
Surya Kolluri, Head of TIAA Institute

7:30–8:15 AM

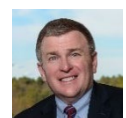
Networking Breakfast
Sponsored by:

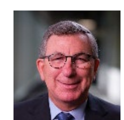
8:35–9:30 AM

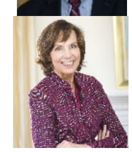
Opening Remarks & Perspectives

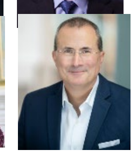
Emcee-Welcome Remarks
Jillian Froment, Executive Vice President & General Counsel, ACLI

Chair's Perspective
Paul Quaranto, Chairman, CEO & President, Boston Mutual
Gavel Exchange
Rich Bielen, President & CEO, Protective Life









President's Perspective
Susan Neely, President & CEO, ACLI
David Chavern, President & CEO (incoming), ACLI

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 todays' headlines, and breaking down what each development could mean for individuals, businesses, and industries.
Moderator:
Paul Quaranto, Chairman, CEO & President, Boston Mutual
Speaker:
Kevin McCarthy, 55th Speaker of the U.S. House of Representatives

10:15–10:45 AM

Networking Refreshment Break
Sponsored by:

10:45–11:45 AM

Concurrent Sessions

1. Finance/Investment Focus Session

Residential Mortgage Loans – A Compelling Case for Life Insurance Companies

The combination of attractive yields, efficient capital treatment and favorable financing sources creates a compelling investment case for RMLs. The growth of specialized residential loan investment managers who can manage the operational complexities of the product has also made it easier for insurance portfolios to gain exposure to the asset class without requiring additional resources.

Moderator:
Kevin Gasvoda, Chief Financial Officer, Shelter Growth Capital Partners
Speakers:
Stewart Foley, Founder and Managing Partner, Insurance AUM
Bryan Lentz, Director, MBS Trading, Mutual of Omaha
Thomas Settino, Vice President, FHLB of New York

2. Technology/ Trends Focus Session

Achieving AI Readiness to Drive Efficiency and Innovation

Explore the critical steps to becoming AI-ready by streamlining data and systems using Universal APIs. This session delves into how modernizing legacy platforms and simplifying complex systems can enhance operational efficiency and data accessibility. Learn from industry experts about the role of Universal APIs in creating a connected ecosystem, enabling seamless integration, and maximizing AI capabilities. Discover how simple API connections with modern distribution partners can drive new sales and growth. Gain practical insights into transforming your organization's data infrastructure to fully capitalize on AI investments.

Moderator:
Nelson Lee, Founder, iLife Technologies
Speakers:
Brad Butler, Chief Information Officer, U.S./Latin America, RGA
Kelly Coomer, Senior Vice President & Chief Information Officer, Sammons Financial Group
Jim Galli, Managing Director, Paradigm Partners International
Sridhar Potnuru, Principal Enterprise Architect, TransAmerica Individual Life

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.

Speakers:
Glenn Merten, Partner, Faegre Drinker
Dan Aronowitz, President, Encore Fiduciary
Sponsored by:
faegre drinker

4. Industry Issues Focus Session

Reputation Management: Communicating in Highly Charged Times

In an era marked by polarization and heightened sensitivities, authentic and effective communication is more critical than ever. From political debates to social issues, internal and external communications are impacted. We'll dive into considerations for navigating communication in such a complex environment.

Moderator:
Sarah Tyre, Vice President, Reputation & Issues Management, Prudential Financial
Speaker:
Tiffany Baker, Chief Communications Officer, Transamerica
Kendall Seketa, Vice President, New Product Strategy, Gravity Research

12:00–1:45 PM **Luncheon Session**

ACLI Rising Leader Program Class of 2024 Graduation

Political Action Committee (PAC) Update
Speaker:
Eric Steigerwalt, President & Chief Executive Officer, Brighthouse Financial

General Session: Life Insurers and Financial Resilience for Families and Small Businesses
This session will explore how life insurers demonstrate their value proposition and are an essential part of public policy solutions to address economic anxiety and vulnerabilities of average Americans. ACLI has built a new tool for the industry to platform and present our attributes: the ACLI Financial Resilience Index. The panel will examine how families and small businesses influence public policymaking and serve as a rally cry to the audience to engage in the public square in industry-wide campaigns to advance the capabilities of life insurers to address societal needs.
Moderator:
Dr. Robert Wescott, President & Founder, Keybridge
Speakers:
Dan Houston, Chairman & CEO, Principal Financial Group
Eric Steigerwalt, President & Chief Executive Officer, Brighthouse Financial

Sponsored by:
EVERSHEDS SUTHERLAND

2:00–3:00 PM <u>**Concurrent Sessions:**</u>

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:
   Maureen Adolf, Senior Policy Adviser/Insurance, Eversheds Sutherland
   Brian Barrett, Partner, Eversheds Sutherland
   Catherine Murphy, Vice President & US Deputy Appointed Actuary, John Hancock Life Insurance Company
   Theresa Resnick, Senior Vice President and Actuary, Everlake Life Insurance Company
2. Technology/Trends Focus Session
   The Customer of The Future
   McKinsey & Company will cover How changing demographics, demand for improved experience, and new opportunities for "healthy aging" are creating new opportunities to increase the industry's relevance.
   Speakers:
   Alexander Gestal, Associate Partner, McKinsey & Company
   Jason Ralph, Partner, McKinsey & Company
   Holger Wilms, Senior Partner, McKinsey & Company

3. Compliance/Legal Focus Session
Navigating the Tension: Governing AI vs Advancing AI
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:
Michelle Carroll Foster, Chief Inclusion Officer, ACLI
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 Mixer
Unwind and Connect at the Milliman 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!
Sponsored by:
Milliman

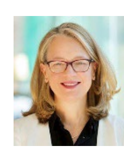
6:00 – 8: 00 PM

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 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:
wtw

FRIDAY, SEPTEMBER 27

Conference Emcee
Jill Kozeny, Executive Vice President & Chief Advocacy Officer, ACLI



7:45 – 8:30 AM

Rising Leader Networking Breakfast *(Invitation only)*

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
Sponsored by:

8:45–9:30 AM

General Session - Crossing the Generational Divide
We live in a time of rapid generational change, challenge, and opportunity. Leaders live this daily from recruiting and retaining different generations of employees to inspiring trust, engagement, and effective communication across multiple generations and geographies. Making the challenge even more costly are dramatically different work expectations by generation, the rapid emergence of AI, and a gap in how to best drive engagement and performance now. In this inspiring, research-driven presentation, acclaimed generational researcher and speaker Jason Dorsey separates myth from truth about generations and what most unlocks their performance.

Speaker:
Jason Dorsey, Renowned Researcher and Generational Expert

9:45–10:45 AM

<u>**Concurrent Sessions:**</u>

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, ACLI
   Speakers:
   Ryan Donovan, President & Chief Executive Officer, Council of Federal Home Loan Banks
   Michael Ericson, President & Chief Executive Officer, Federal Home Loan Bank of Chicago
   Jim Vance, President, WS Ventures
2. Technology/ Trends 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 Fariss, Director and Actuary, Milliman IntelliScript
   Nick Milinovich, Senior Director, Underwriting Strategic Partnerships, Northwestern Mutual
   Roger Tafoya, President and Chief Underwriter, Predictive Resources

3. Compliance/ Legal Focus Session

The Future of SEC Investment Management Regulation
A review of past, current, and possible future states of SEC investment management regulation following the November elections. Among other things, a panel of experts would explore the recent changes in fund reporting and disclosure, an update on litigation regarding the SEC's private fund rule, and provide trends regarding the SEC's Division of Investment Management. The discussion will also review challenges insurance companies and their affiliated investment managers face with increased reliance on alternative investments. Best practices and compliance strategies will be considered.
Moderator:
Madison Ward, Counsel, ACLI
Speakers:
Adam Aderton, Partner, Litigation, Willkie Farr & Gallagher
Eric Banta, Senior Vice President & Chief Counsel, Voya Investment Management
Ron Coenen, Partner, Eversheds Sutherland

10:45–11:00 AM **Networking Refreshment Break**
Sponsored by:

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.
Moderator:
Larry Hamilton, Partner, Mayer Brown
Speakers:
Kevin Clark, Chief Accounting Specialist, Iowa Insurance Division
Caitlin Colvin, Managing Director, Blackstone Credit and Insurance
Jenna Jenson, Vice President, Managing Counsel, Thrivent
Stephen Smith, Head of Insurance Analytics, Neuberger Berman

2. Industry Issues Focus Session

Changing Lives with Early Detection Technology
Six in 10 Americans live with a chronic illness, such as heart disease, cancer, diabetes, or other conditions. That means early detection for these health issues can make a world of difference not only for individuals and their families, but for society, our healthcare system, and even our businesses. This session will explore the unique opportunity for life insurers to impact their customers' lives far beyond the traditional role of a passive claims payer as preventative health solutions become more critical in the war on cancer and other diseases, specifically highlighting technology such as GRAIL's multi-cancer early-detection test, Galleri® and Prenuvo's whole-body MRI scans.
Speakers:
York Barrington, Director, Physician Relations, Prenuvo
Matt Gibson, AVP, Head of Behavioral Insurance Activation, John Hancock
Horacio Herrera Fajer, Head of Life Insurance Partnerships, GRAIL

3. Compliance/ Legal Focus Session
Big Picture – Legislative and Political Landscape in 2025 Election
Speakers:
Kathleen Coulombe, Senior Vice President, Federal Relations, ACLI
Doug Sosnik, Former Clinton White House Adviser
Leah Walters, Senior Vice President, State Relations, ACLI

12:15–1:30 PM **Closing Luncheon**

Life Happens Presentation
Speaker:
Brian Steiner, Executive Director, Life Happens

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
Sponsored by:
CARLTON FIELDS

1:30 PM **Adjournment**