CONFERECE PROGRAM

As of 6/25/2024 - 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)
  CEO Steering Committee on Taxation
  CEO Steering Committee on Consumer Issues (with buffet lunch)
  CEO Steering Committee on Prudential Issues
3:00–4:45 PM  ACLI Board of Directors Meeting (ACLI members only)
5:00–5:30 PM  Rising Leader Reception (Invitation only)
5:30–6:30 PM  Welcome Reception
6:30 –9:00 PM  ACLI Board of Directors Dinner (Invitation only)

THURSDAY, SEPTEMBER 26

7:15–8:30 AM  Rising Leader Program Breakfast (Invitation only)
7:30–8:30 AM  Networking Breakfast
8:40–9:30 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
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, 55th 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
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

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**

   This session would include a panel of experts sharing their perspectives and insights
on governance, benchmarking, and current AI issues at the SEC and FINRA.

   Moderator:
   - **Chad Eslinger**, Chief Compliance Officer, Resolution Life

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**, The Finance Bar

3:00–3:30 PM  
**Networking Social**

4:30 – 6:00 PM  
**PAC Reception**

6:00–8:00 PM  
**Networking Reception**

**FRIDAY, SEPTEMBER 27**

7:45–8:30 AM  
**Hot Issues Breakfast Session**
<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:45–9:30 AM</td>
<td><strong>Conference Emcee- Friday</strong>&lt;br&gt;<em>Jill Kozeny</em>, Executive Vice President &amp; Chief Advocacy Officer, Public Affairs, American Council of Life Insurers</td>
</tr>
<tr>
<td></td>
<td><strong>General Session</strong></td>
</tr>
<tr>
<td>9:45–10:45 AM</td>
<td><strong>Concurrent Sessions:</strong>&lt;br&gt;1. Finance/ Investment Focus Session&lt;br&gt;<strong>Federal Home Loan Bank Update</strong>&lt;br&gt;Speakers TBA&lt;br&gt;2. Industry Issues Focus Session&lt;br&gt;3. Technology/ Trends Focus Session&lt;br&gt;4. Compliance/ Legal Focus Session</td>
</tr>
<tr>
<td>10:45–11:00 AM</td>
<td><strong>Networking Refreshment Break</strong></td>
</tr>
<tr>
<td>11:00 AM–12:00 PM</td>
<td><strong>Concurrent Sessions:</strong>&lt;br&gt;1. Finance/ Investment Focus Session&lt;br&gt;<strong>Changing Regulatory Landscape for Life Insurer Investments</strong>&lt;br&gt;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.&lt;br&gt;Speaker:&lt;br&gt;<em>Larry Hamilton</em>, Partner, Mayer Brown&lt;br&gt;2. Industry Issues Focus Session&lt;br&gt;3. Compliance/ Legal Focus Session&lt;br&gt;<strong>Big Picture – Legislative and Political Landscape in 2025 Election</strong>&lt;br&gt;Speakers:&lt;br&gt;<em>Kathleen Coulombe</em>, Senior Vice President, Federal Relations, American Council of Life Insurers&lt;br&gt;<em>Doug Sosnik</em>, Former Clinton White House Adviser&lt;br&gt;<em>Leah Walters</em>, Senior Vice President, State Relations, American Council of Life Insurers</td>
</tr>
<tr>
<td>12:15–1:30 PM</td>
<td><strong>Closing Luncheon</strong></td>
</tr>
<tr>
<td>1:30 PM</td>
<td><strong>Adjournment</strong></td>
</tr>
</tbody>
</table>