



FINANCIAL & INVESTMENT ROUNDTABLE 2024

APRIL 7-10, 2024 THE CLOISTER AT SEA ISLAND, SEA ISLAND, GA



PROGRAM AGENDA

(as of April 4, 2024- times/sessions are subject to change)

SUNDAY, APRIL 7

4:00-5:30 PM

REGISTRATION

Sponsored by:



5:30-6:30 PM

WELCOME RECEPTION

Join us on the Blackbanks Terrace as we kick-off this year's Financial & Investment Roundtable with an evening of networking and cocktails.

Sponsored by:



MONDAY, APRIL 8

7:00 AM-3:45 PM

REGISTRATION

7:15-8:00 AM

WELCOME BREAKFAST

Sponsored by:



8:00 AM

WELCOME AND OPENING REMARKS

Jayson Bronchetti, Executive Vice President, Chief Investment Officer, Head of Hedging & Sustainability, Lincoln Financial Group

Phil Goss, Executive Vice President, Chief Financial Officer & Treasurer, Trustmark

8:05-8:50 AM

GENERAL SESSION: EXECUTIVE OUTLOOK

Speaker:

J. Scott Davison, Chairman, President & Chief Executive Officer, OneAmerica Financial



8:55-9:45 AM

GENERAL SESSION: AI

Moderator:

Thomas Watson, Senior Vice President, Divisional CTO, Risk & Investments Technology, Lincoln Financial Group

Speakers:

Sisi Chen, Director, Risk Modeling Services, PwC

Ted Kwartler, Managing Director, North America Responsible AI Lead, Accenture

David Sherwood, Managing Director, Risk & Financial Advisory, Deloitte

9:45-10:15 AM

REFRESHMENT BREAK

Sponsored by:



10:15-11:05 AM

CONCURRENT SESSIONS (2):

FINANCE BREAKOUT SESSION #1: CHIEF FINANCIAL OFFICER PANEL

Hear a panel of Chief Financial Officers share their perspectives on some of the challenges and opportunities facing today's finance chiefs.

Moderator:

Rupal Shah, Head of Global Client Management and Japan Insurance Solutions, PGIM Portfolio Advisory Speakers:

Liz Dietrich, Chief Financial Officer, Prudential Retirement Strategies, Prudential Financial, Inc.

Andrew Michie, Chief Financial Officer, OneAmerica Financial

Chris Neczypor, Executive Vice President, Chief Financial Officer, Lincoln Financial Group

INVESTMENT BREAKOUT SESSION #1: CHANGES AND MARKET SHIFTS- WHAT DOES IT LOOK LIKE DOWN THE ROAD?

This session will cover a variety of topics including: the shift from public credit to private credit, fundamental changes in the way assets are getting into portfolios, and changes in market with increase in direct lending and privately placed debt instead of traditional IG.

Moderator:

Jack Bishop, Portfolio Manager, Principal Financial Group

Speakers:

Matthew Armas, Managing Director, Global Head of Insurance, GSAM

Shawn Robinson, Co-Head, Private Fixed Income, Apollo Global Management LLC

Sean Ward, Senior Managing Director, Blue Owl Capital, Inc.

11:15 AM-12:00 PM

GENERAL SESSION: GLOBAL AND U.S. DEVELOPMENTS REGARDING CROSS BORDER REINSURANCE

Join us for a fireside chat with Gerald Gakundi from the Bermuda Monetary Authority. During this session we'll provide an introductory view on Bermuda as a jurisdiction for reinsurance, the current overview of transactions and trend lines, and what is on the horizon.

Moderator:

Prannoy Chaudhury, Principal and Consulting Actuary, Milliman

Speaker:

Gerald Gakundi, Director, Insurance Supervision, Bermuda Monetary Authority (BMA)

12:00-1:15 PM

NETWORKING LUNCH

Sponsored by:



1:30-2:15 PM

CONCURRENT SESSIONS (2):

FINANCE BREAKOUT SESSION #2: COMPENSATION TRENDS AND SURVEY DATA

Speaker:

Bryan Ortwein, Senior Director, Executive Compensation and Board Advisory, WTW

INVESTMENT BREAKOUT SESSION #2: CHIEF INVESTMENT OFFICER PANEL

Hear a panel of Chief Investment Officers share their perspectives on challenges, opportunities, and outlook for the remainder of the year.

Moderator:

Nela D'Agosta, Senior Managing Director, Blackstone

Speakers:

Randy Brown, Chief Investment Officer, Sun Life Financial

Nick Liolis, Chief Investment Officer, Guardian Life

Lisa Longino, Chief Investment Officer, Corebridge Financial, Inc.

2:15-2:45 PM

REFRESHMENT BREAK

Sponsored by:



2:45-3:30 PM

GENERAL SESSION: NAVIGATING THE US ECONOMIC LANDSCAPE AND THE IMPLICATIONS OF THE FED PIVOT

T Rowe Price's chief US economist, Blerina Uruci, will discuss key indicators shaping the economic outlook, analyzing the current state of affairs and forecasting potential scenarios. From employment and inflation, to trade and fiscal policies, we'll explore the critical aspects shaping the nation's economic landscape. The presentation will debate the current factors influencing interest rate trends, including Federal Reserve policies, economic indicators, and global dynamics.

Speaker:

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

Sponsored by:



3:45-5:00 PM

ROUNDTABLE DISCUSSION GROUPS (MEMBERS ONLY)

Join fellow life insurance company colleagues in private members only discussion groups for candid conversations about pressing issues and best practices.

6:15-7:15 PM

NETWORKING RECEPTION

Enjoy cocktails and networking with colleagues.

Reception sponsored by:



Reception entertainment sponsored by:



7:15-11:30 AM

REGISTRATION

7:45-8:30 AM

NETWORKING BREAKFAST

Sponsored by:



8:30-9:15 AM

GENERAL SESSION: A VIEW FROM WASHINGTON: 2024: PRESIDENTIAL RACE- IS THIS A REMATCH? WHAT'S CHANGED?

In this moderated session, Ms. Cantrill will unravel the complexities of the upcoming 2024 presidential election, shedding light on the potential risks and opportunities that recent developments from Washington present. Her discourse will include policy considerations under a Biden and Trump administration and potential impact on markets.

Moderator:

Anthony Grandolfo, Chief Investment Officer, GE Capital North American Life and Health

Speaker:

Libby Cantrill, Managing Director, Head of U.S. Public Policy, PIMCO



9:20-10:15 AM

GENERAL SESSION: WHAT DOES THE FUTURE OF ESG LOOK LIKE?

ESG dominated headlines in 2023. The Democratic/Republican divide on climate, social, and governance issues has persisted for some time. This session will explore how ESG is impacting insurers today and what we can expect in the near term and beyond.

Moderator:

Lydia Covert, Corporate Sustainability Director, Unum

Speakers:

Loren Monroe, Practice Co-Head and Principal, BGR Group

Sarah Wilson, Managing Director, Head of ESG Integration Responsible Investing, Nuveen

10:15-10:30 AM

REFRESHMENT BREAK

Sponsored by:



10:30-11:30 AM

GENERAL SESSION: REAL ESTATE OUTLOOK

Moderator:
Matthew Reilly, Managing Director, Head of Insurance Solutions, Conning
Speakers:
Yasmine Kamaruddin, Director, Research & Strategy at BlackRock Real Estate
Scott Miller, Managing Director, Bridge Investment Group
John Ockerbloom, Head of U.S. Real Estate, Barings

1:00-5:00 PM

OPTIONAL EVENT: GOLF TOURNAMENT

Location: Seaside Course
Join your colleagues for a fantastic afternoon of networking and a memorable golf experience. Seaside is an ocean-side links course that combines its beautiful natural setting with a golf course that is both challenging and fun. It is routinely ranked among the top 100 courses in the United States.
Golf Sponsored by:



Golf Beverage Cart Sponsored by:



3:00-5:00 PM

OPTIONAL EVENT: PICKLEBALL & PROSECCO SOCIAL

All levels are welcome. If you are new to pickleball, an experienced dinker, or just want to be social and cheer on your fellow attendees with a cocktail, join us for this fun afternoon event.
Sponsored by:



6:45-7:30 PM

NETWORKING RECEPTION

Discover the beauty of Rainbow Island with cocktails, great music and another chance to network with industry colleagues.
Reception sponsored by:



Reception entertainment sponsored by:



7:30- 9:00 PM

DINNER

Following the cocktail reception, join us for a local seafood dinner under the stars.
Sponsored by:



7:30-9:00 AM

REGISTRATION

8:00-9:00 AM

BREAKFAST SESSION: RATING AGENCY OUTLOOK

This panel will discuss rating agency trends and share insights on factors impacting the ratings outlook for the life insurance industry as we move forward in 2024.
Moderator:
Deep Banerjee, Senior Vice President & Treasurer, Protective Life Corporation

Speakers:

Carmi Margalit, Managing Director, Life Insurance Sector Lead, S&P Global Ratings

Scott Robinson, Associate Managing Director, Moody's

Jamie Tucker, Senior Director, North American Insurance Ratings, Fitch Ratings

Sponsored by:



9:00 AM

ADJOURNMENT