





AGENDA

(as of March 2, 2022)

SUNDAY, MARCH 6

- 4:00–6:30 PM **REGISTRATION**
- 5:30–6:30 PM **WELCOME RECEPTION**

MONDAY, MARCH 7

- 7:00 AM–5:00 PM **REGISTRATION**
- 7:15–8:45 AM **NETWORKING BREAKFAST**
Sponsored by:

- 8:45–9:00 AM **WELCOME AND OPENING REMARKS**
Speaker:
Mariana Gomez-Vock, Vice President & Deputy, Policy Development, American Council of Life Insurers
- 9:00–9:20 AM **STATE OF THE INDUSTRY**
ACLI CEO Susan Neely will offer her perspective on the societal challenges that we face today and how the life insurance industry can lead.
Speaker:
Susan Neely, President & Chief Executive Officer, American Council of Life Insurers
- 9:20–10:00 AM **EXECUTIVE OUTLOOK**
This panel of CEO’s will review the hot topic sessions included in this year’s conference and share their perspectives on each of the issues.
Moderator:
Pete Schaefer, President & Chief Executive Officer, Hannover Re
Speakers:
Jeff Poulin, Chief Executive Officer, Canada Life Reinsurance
Laurent Rousseau, Chief Executive Officer, SCOR
- 10:00–10:30 AM **REFRESHMENT BREAK**
Sponsored by:

- 10:30 AM–11:15 AM **ECONOMIC OUTLOOK PANEL**
Moderator:
Tod Nasser, Chief Investment Officer, Pacific Life
Speakers:
Scott Miner, Global Chief Investment Officer, Guggenheim Partners and Chairman, Guggenheim Investments
Jay Wintrob, Chief Executive Officer, Oaktree Capital Management

11:15 AM-12:00 PM

GENERAL GLOBAL TAX ISSUES

This session will feature expert tax panelists from the Organisation for Economic Co-operation and Development (OECD) in Paris, the Association of British Insurers (ABI) in London, and Ernst & Young (EY) in Washington, D.C. The session will focus on the implementation of a new global minimum tax, the purpose behind the new tax regime, implications for life insurers and reinsurers, and how it will impact business operations. The panelists will cover issues of concern for life insurers, how various worldwide tax regimes will integrate with the OECD global minimum tax and what that means for U.S. based and foreign parented U.S. companies.

Moderator:

Regina Rose, Senior Vice President, Taxes & Retirement Security, American Council of Life Insurers

Speakers:

Jeff Mitchell, Adviser, International Co-operation and Tax Administration, Centre for Tax Policy and Administration, Organisation for Economic Co-operation and Development (OECD) (Virtual)

Chris Ocasal, Principal, Ernst & Young LLP

Mervyn Skeet, Assistant Director, Head of Taxation, Association of British Insurers

12:00-2:00 PM

NETWORKING LUNCH

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KING & SPALDING

2:00-3:15 PM

INNOVATION IN ANNUITIES

With an aging population, government provided social insurance systems running low on funds and continuing low interest rates, annuity sales are struggling. In addition, regulators are requiring more capital to be held on products with guarantees making returns on these products marginal. A prominent distributor, major annuity writer and elite product developer will discuss new and innovative products ideas that could change the market.

Moderator:

Tim Hill, Consulting Actuary & Principal, Milliman, Inc.

Speakers:

Tom Haines, Chief Investment Officer, Annexus Retirement Solutions

Miles Kaschalk, Head of Corporate Development, Venerable

3:15-3:45 PM

REFRESHMENT BREAK

Sponsored by:



3:45-5:00 PM

LIFE INSURANCE SALES/TECHNOLOGY

Moderator:

Dennis E. Barnes, Chief Executive Officer, RGAX and Chief Marketing Officer, RGA

Speakers:

Brandon Carter, Chairman & President, USAA Life Insurance Company

George Nichols, III, President & Chief Executive Officer, The American College of Financial Services

Melbourne O'Banion, Co-Founder & Chief Executive Officer, Bestow Inc.

5:00-6:00 PM

NETWORKING RECEPTION

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7:30 AM-5:00 PM

REGISTRATION

7:45–9:00 AM

NETWORKING BREAKFAST

Sponsored by:



9:15–9:20 AM

DAY 2 WELCOME AND REMARKS

Speaker:

Dale Hall, Managing Director of Research, Society of Actuaries

9:20–9:35 AM

HUMAN CAPITAL AND DEI – IMPLICATIONS FOR INSURERS

This presentation will address human capital implications of DEI issues for the U.S. insurance industry. It will also look at demographic and cultural challenges facing the profession as it seeks to diversify employment, how leading insurers are addressing the issue, and what appears to be working (or not). It will conclude by offering observations on the challenges and path ahead for this issue.

Speaker:

Greg Heidrich, Chief Executive Officer, Society of Actuaries

9:35–10:25 AM

DIVERSITY IN THE BOARDROOM

Women are key drivers of the U.S. economy and their presence in leadership roles throughout the industry is critical to building a strong workforce. However, women still make up less than 20% of insurance industry Board members. The percentage is even lower for women of color. Listen in as these industry leaders discuss critical steps to improve diversity in Board rooms and foster leadership across the value chain to strengthen the economy and industry as a whole.

Moderator:

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

Speakers:

Mary Ann Brown, PartnerRe Board Member**Tricia Guinn**, RGA Board Member**Barbara Turner**, President & Chief Executive Officer, Ohio National Financial Services

10:25–11:00 AM

REFRESHMENT BREAK

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11:00 AM– 12:00 PM

THE MIDTERMS: WHAT TO EXPECT NEXT NOVEMBER AND BEYOND WITH KEYNOTE SPEAKERS: ALEX CASTELLANOS AND STEPHANIE CUTTER

Midterm elections always matter — but in this divided era, as the country begins a redistricting cycle amid a wave of new laws that will make it harder for Americans to vote, the 2022 midterms will matter more than most. From the role of primary voters to the issues that will bring voters to the polls a year from now, hear early insight from some of the best in the business: **Stephanie Cutter**, political consultant and Founding Partner of Precision, and a veteran of both Obama campaigns and the Obama White House and **Alex Castellanos**, founder of Purple Strategies, and former strategist for the Ryan-Romney and Bush-Cheney campaigns.

Moderator:

Joyce Meyer, Executive Vice President, Government Relations, American Council of Life Insurers

Speakers:

Alex Castellanos, Political Strategist and Analyst**Stephanie Cutter**, Legendary Political Strategist, Former Deputy Campaign Manager & Senior Advisor to President Obama

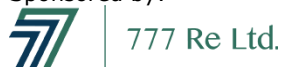
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12:00–2:00 PM

NETWORKING LUNCH

Sponsored by:



2:00–3:15 PM

WHY INSURERS ARE DIVESTING BLOCKS OF LIFE AND ANNUITY BUSINESS: THE BUSINESS PERSPECTIVE

The session will focus on the increased activity in the sale of blocks of life insurance business. Almost every

major insurer has either sold or announced the sale of a portion of its life and retirement business. What is driving these changes, and what might it mean for the future of the business.

Moderator:

Dom Lebel, Managing Director & Leader, Americas Life Practice, Willis Towers Watson

Speakers:

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

Matt Grove, Chief Executive Officer & President, Resolution Life USA

Michael Hovey, Senior Managing Director, Blackstone Insurance Solutions

3:15–3:45 PM

REFRESHMENT BREAK

Sponsored by:



3:45–5:00 PM

WHY INSURERS ARE DIVESTING BLOCKS OF LIFE AND ANNUITY BUSINESS: THE REGULATOR PERSPECTIVE

The session will include a panel of regulators discussing their views on the increased activity in the sale of blocks of life insurance business.

Moderator:

Ken Frino, Managing Director, AM Best

Speakers:

Nicolas Colpaert, Senior Policy Advisor, International Association of Insurance Supervisors (IAIS)

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

Doug Ommen, Commissioner, State of Iowa Division of Insurance

5:00–6:00 PM

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7:45–10:00 AM

REGISTRATION

7:45–8:45 AM

NETWORKING BREAKFAST

Sponsored by:



8:45–10:00 AM

PRECISION MEDICINE AND OMICS

The life insurance industry is uniquely positioned to be the leader in bringing technology to its policyholders now. This panel will shed light on the OMIC revolution and the advancements to expect in the near and long term in respect to medical technology as well as technology that is available today for cancer care that is not made available by the standard of care.

Moderator:

Tom Wamberg, Executive Chairman & Founder, healthōme

Speakers:

Dr. Ezra Cohen, FRCPS, FASCO, Medical Oncologist

Anne Melissa Dowling, CFA, Independent Director