





## AGENDA

(as of February 10, 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 and Chief Executive Officer, Hannover Life Reassurance Company of America  
Speaker:  
**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 Minerd**, 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**

Moderator:

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

Speakers:

**Chris Ocasal**, Principal, Ernst & Young LLP

**Grace Perez-Navarro**, Deputy Director, Centre for Tax Policy and Administration, Organisation for Economic Co-operation and Development (OECD) (Virtual)

**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:

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

**Melbourne O'Banion**, Co-Founder and CEO, 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:



- 9:00-9:05 AM **DAY 2 WELCOME AND REMARKS**  
Speaker:  
**Dale Hall**, Managing Director of Research, Society of Actuaries
- 9:05-9:20 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
- 9:20-10:30 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 & CEO, 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
- 10:30-11:00 AM **REFRESHMENT BREAK**  
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**Wilton Re**  
*Strength of Experience*
- 11:00 AM- 12:00 PM **THE MIDTERMS: WHAT TO EXPECT NEXT NOVEMBER AND BEYOND WITH KEYNOTE SPEAKERS: ALEX CASTELLANOS AND STEPHANIE CUTTER**  
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, Founder of Precision Strategies, and Former Deputy Campaign Manager & Senior Advisor to President Obama  
  
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**hannover re**<sup>®</sup>
- 12:00-2:00 PM **NETWORKING LUNCH**  
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**777 Re Ltd.**
- 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, Willis Towers Watson  
Speakers:  
**Rich Bielen**, President & Chief Executive Officer, Protective Life Corporation  
**Yanela Frias**, President, Prudential Retirement  
**Matt Grove**, Chief Executive Officer & President, Resolution Life USA

3:15–3:45 PM

**REFRESHMENT BREAK**

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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:

**Gerald Gakundi**, Director, Insurance Supervision, Bermuda Monetary Authority (BMA)**Doug Ommen**, Commissioner, State of Iowa Division of Insurance**Romain Paserot**, Deputy Director, International Association of Insurance Supervisors (IAIS)

5:00–6:00 PM

**NETWORKING RECEPTION**

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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, FRCPSC, FASCO**, Medical Oncologist**Dr. Thomas J. Graham**, Past Chairman of Cleveland Clinic Innovations**Anne Melissa Dowling**, CFA, Independent Director