

Updates on the Issues Affecting Your Business



LIC Laws and Legislation Committee Conference Call

Register at www.loma.org/LICLL

Wednesday, May 19, 2021, 2:00-3:30 p.m. EDT

AGENDA

I. Welcome

II. Moody's vs Society of Actuaries NAIC RBC Factors

- a. [Moody's](#)
- b. [SOA](#)

Please review our Antitrust Policy

www.loma.org/antitrust

III. Update on Litigation, Legislation, and Regulations

Jessica Sever, JD, ALMI, AIRC, ACS, Business Unit Compliance Liaison Director, Assurant

- A. Unclaimed Property Legislation and Lawsuits
- B. Lost Policy Services
- C. State Life Insurance Regulations – Passed, Failed, and Pending
- D. Guaranty Association Changes
- E. NAIC Issues / Industry Issues
- F. State Issues
- G. End of Life Legislation
- H. Industry Updates

IV. Additional Questions

V. Adjourn

Preliminary Attendee List:

American Savings Life Insurance Company - Michael Frahm, MBA, CFP, CLU, CCP, FLMI, Vice President
Assurant - Jessica Sever, Business Unit Compliance Liaison Director
Catholic Order of Foresters - Chris Nowotarski, JD FLMI, AIRC, General counsel
Columbian Financial Group - Stacey Boyer, FLMI, Director
Cyrus Life Insurance Company - Mike Lewis, President
ELCO Mutual Life & Annuity - Eric Myers, General Counsel
ELCO Mutual Life & Annuity - Jeff Rasmus, Chief Compliance Office
ELCO Mutual Life and Annuity - Lori Lemme, PHR, SHRM-CP, ALMI, ACS, Vice President of HR
Greek Catholic Union of the U.S.A. - Scott Schuetz, Chief Operating Officer, EVP
Gleaner Life - Barbara Janowski, RN, ALMI, AALU, VP, Insurance Operations & Chief Underwriter
iPipeline - Chris Haffey, Product Sales Specialist
iPipeline - Michelle Brands, Director, Sales
Liberty Bankers Insurance Group - Janet Gustafson, SVP Compliance & Corporate Secretary
LIC - Audrey Wittenburg, ALMI, ACS, Associate Director
LIC - Jeff Shaw, CLU, ChFC, Executive Director
Lincoln Financial - Greensboro Office, United States - Katie Riddle, NCCP, ALMI, Paralegal, Life Products
Lincoln Heritage Life Insurance - Monica Sole, FLMI, ACS, AIR, ARA, Vice President Government & Industry Relations
Locke Lord - Brian Casey, Partner
Management Research Services, Inc. - Brenda Larson, AMLI, ACS, Director of Life Strategy & Innovation
Management Research Services, Inc. - Tim Dineen, Chief Executive Officer
NCSF - Tu Hornstra, FLMI, ACS, Chief Operations Manager
Pekin Life Insurance Company - Amy Darling, FLMI, FLHC, ACS, ARA, AFSI, VP - Life Claim
Prosperity Life Insurance Group - Ann-Kelley Winn, VP- Deputy General Counsel & Chief Compliance Officer
Puritan Life Insurance Company of America - Leah Myers Myers, Senior Compliance Analyst
SSAM Alternative Dispute Resolution - John Camillo, Esq., Mediator/Arbitrator
Texas Life Insurance Company - Brenda Hensel, Claims Senior Associate
Texas Service Life Insurance Company - C.J. Rathbun, FLMI, AIRC, CSA, HIA, CCEP, Compliance Officer

thinktum inc - Jenn McLean, AVP Operations
Trilogy Actuarial Solutions - Brett Mushett, FSA, MAAA, Founding Partner
Trilogy Actuarial Solutions - Douglas Brown, ASA, MAAA, Founding Partner
WAEPA - Stephanie Baker, ACS, GBDS, Senior Vice President, Member Services