

Strategies for Small-Company Investment and Capital Management



LIC Investment Committee Meeting

Hosted by Catholic Order of Foresters | Naperville, IL | October 16-17, 2024

Meeting Location: Catholic Order of Foresters, 355 Shuman Blvd, Naperville, IL 60563

Recommended Hotel: Chicago Marriott Naperville, 1801 N Naper Blvd, Naperville, IL 60563

AGENDA & ATTENDEE LIST

Wednesday, October 16, 2024

2:00 pm CT **Welcome & Attendee Introductions/Activity Reports**

What's the most important news in your life today, personally and professionally? Hear what's going on at other companies and get to know your fellow Investment executives.

2:30 pm CT **Presentations/Discussion**

4:30 pm CT **Adjourn for the Day**

6:30 pm CT **Hosted Networking Dinner**

Thursday, October 17, 2024

8:30 am CT **Continental Breakfast**

9:00 am CT **Presentations/Discussion**

10:00 am CT **Investment & Capital Management Facilitated Discussion**

Participants submit topics in advance for group discussion with live polling.

11:30 am CT **Networking Luncheon Hosted by Catholic Order of Foresters**

12:30 pm CT **Adjourn**

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SAMPLE ATTENDEE LIST (from last year)

AAM-Insurance Investment Management - John Olvany, Principal, Business Development
Allen Bailey & Associates - Tom Wurfel, President (Remote)
American Fraternal Alliance - Allison Koppel, CEO
American Savings Life Insurance Company - Byron Allen, President/CEO
American Savings Life Insurance Company - John Shirts, Chief Financial Officer
American Savings Life Insurance Company - Paul Whetten, EVP/COO
AQS Asset Management - Stephen Gonzalez, Portfolio Manager
Balanced Growth Consulting - Jason Bordui, President & Founder
Baltimore Life Insurance - Mark Glickman, Vice President, Business Intelligence
Bruce & Bruce - Andrew Edelsberg, SVP - Business Strategist
Catholic Life - Christopher Belz, Executive Vice President/Corporate Relations
Catholic Order of Foresters - Benjamin Guzman Jr, Portfolio Manager - Private Placements & Real Estate
Catholic Order of Foresters - Greg Temple, President and Chief Executive Officer
Catholic Order of Foresters - Laura Stanek, Portfolio Manager
Catholic Order of Foresters - Mike Deering, Vice President Investments
Catholic Order of Foresters - Taylor Zeck, Investment Assistant
Clearpoint Advisors LLC - Eric Rader, President
Converge RE - Moshe Lichtenstein, CIO (Remote)
CSA Fraternal Life - John Kielczewski, President / CEO
ELCO Mutual Life and Annuity - Ponni Nainar, Accounting Representative (Remote)
ELCO Mutual Life and Annuity - Silvio Rodia, VP/CRO
Government Personnel Mutual Life Insurance Company - Robert Draper, Vice President - Investments
Homesteaders Life Company - Steve Pick, Executive VP-Chief Financial Officer/Treasurer
Innovative Capital Advisors, LLC - Peter Mavrogenes, CEO
KSKJ Life - Brian Sharp, CFO
Parkway Advisors - Kyle Timmermann, VP of Business Development (Remote)
Parkway Advisors, LP - Bryce Bevill, Investment Associate
Royal Neighbors of America - Evan Johnson, Senior Investment Manager (Remote)
SPJST - Roy Vajdak, Controller (Remote)
SWBC - Christopher McManus, Senior vice president
SWBC Investment Services - John Tuohy, CEO
SWBC Life - Joan Cleveland, President & Chief Executive Officer
Trilogy Actuarial Solutions - Douglas Brown, Founding Partner (Remote)
United Benefits, Inc. - Charlie Allison, President