

Enterprise Risk Management: Shared Challenges and Practical Solutions



LIC ERM Committee Meeting

Hosted by Liberty Bankers Insurance Group | Dallas | May 7-8, 2024



PRELIMINARY AGENDA & ATTENDEE LIST

Tuesday, May 7, 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 with the other attendees and get to know your fellow ERM execs.
- 2:30 pm CT **ERM Facilitated Discussion**
Questions submitted by participants will be prioritized and then serve as a launching point for group discussion. Topics requested so far include: ORSA, Capital Modeling, tools/services for tracking regulatory changes, how we can add value through ERM. Sign up and add the topics you'd like to discuss with your peers.
- 3:00 pm CT **Anticipating the Effects of AI on ERM Strategy and Management**
Kartik Sakhivel, PhD, MS-IT/MS-CS, MBA, PGC-IQ, Vice President & Chief Information Officer, and Regional Chief Executive Officer – Asia West, LIMRA and LOMA
Insights on the how the emergence and adoption of AI for insurance operations, marketing, product development, cybersecurity, etc., will influence and affect a company's ERM decisions.
- 4:00 pm CT **Adjourn for the Day**
- 6:15 pm CT Hosted Networking Dinner at Mexican Sugar at Las Colinas**
3215 Regent Blvd, Irving, TX 75063 – Carpools/rideshares depart from Renaissance lobby about 5:45 pm. *(Note time change.)*

Wednesday, May 8, 2024

- 8:30 am CT **Continental Breakfast Hosted by Liberty Bankers Insurance Group**
- 9:00 am CT **Practical ERM**
John Blocher, FSA, MAAA, Chief Risk Officer, Liberty Bankers Ins. Group
ERM topics with practical application including ERM Dashboard example and discussion, Minimum Guaranteed Interest (MGIR) Report example, plus ERM-ORSA Committee Recent Activities.
- 10:00 am CT **Panel & Discussion: ERM Insights**
Kelly Bretz, FSA, MAAA, CFA, Consultant, Bruce and Bruce
Matt Earhart, Compliance/Enterprise Risk Specialist, Catholic United Financial
- 11:00 am CT **Additional Facilitated Discussion**
- 11:30 am CT **Networking Luncheon Hosted by Liberty Bankers Insurance Group**
- 12:30 pm CT **Adjourn**

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ATTENDEE LIST

American Farmers & Ranchers Life - Mark Hayhurst, PMP, PFMM, Director, Strategic Planning & Operations
 American Savings Life - John Shirts, CPA, CFA charterholder, Chief Financial Officer
 American Savings Life Insurance Company - Michael Frahm, MBA, CFP, ChFC, CLF, CCP, FLMI, Senior VP (Remote)
 Bruce and Bruce Company Consulting Actuaries - Kelly Bretz, FSA, MAAA, CFA, Consultant
 Catholic Order of Foresters - Matt Korienek, ASA, MAAA, Senior Product Actuary (Remote)
 Catholic United Financial - Matt Earhart, ACS, Compliance/Enterprise Risk Specialist (Remote)
 CL Life and Annuity Insurance Company - Katrina Starkie, ACA FLMI, Controller
 Converge RE - Dariush Akhtari, FSA, FCIA, MAAA, Chief Actuary
 CSA Fraternal Life - Nick Kosmas, Secretary / Treasurer (Remote)
 First Catholic Slovak Union - John Tokarsky, Treasurer
 Friedland Consulting Services, LLC - Bruce Friedland, MBA, FSA, MAAA, CLU, ChFC, Principal
 GPM Life - Wally Taylor, FALU, CLU, ChFC, FLMI, AIRC, ACS, Vice President, Corporate Underwriting Officer (Remote)
 Homesteaders Life Company - Judi Naanep, FSA, MAAA, CERA, VP Actuarial Services (Remote)
 Investors Preferred Life Ins. Co. - Alex Phillips, JD, Director of Compliance (Remote)
 KSKJ Life - Amy Bourg, ALMI, Manager of Operations, Compliance
 Liberty Bankers Insurance Group - David Vrla, FSA, MAAA, FLMI, Chief Actuary
 Liberty Bankers Insurance Group - John Blocher, FSA, MAAA, Chief Risk Officer
 LIC - Audrey Wittenburg, ALMI, ACS, Associate Director (Remote)
 LIC - Dean Lambert, Executive Director
 LIMRA and LOMA - Kartik Sakthivel, Vice President and Chief Information Officer (Remote)
 National Life - JF Breton, AVP
 Parkway Advisors - Theron Holladay, CFA, President & CEO
 Physicians Mutual - Mark Nelson, FSA, MAAA, CERA, VP Enterprise Risk Management (Remote)
 Royal Neighbors of America - Rebecca Cavanaugh, Deputy General Counsel
 Savings Bank Mutual Life Insurance Company of Massachusetts, United States - Maria Cianfichi, CPA, CFSA, CRMA, VP, Dir of Internal Audit/ERM/SIU (Remote)
 Teachers Life - Cherisse Norman, MBA, CPA, CMA, Chief Financial Officer/Chief Operating Officer (Remote)