

# Shared Challenges and Opportunities for Smaller Companies



## LIC Operations Committee Meeting

Hosted by Baltimore Life | Owings Mills MD | September 24-25, 2024



**Meeting Location:** Baltimore Life, 10075 Red Run Boulevard, Owings Mills, MD 21117-4871  
**Recommended Hotel:** Marriott Owings Mills Metro Centre, 10101 Grand Central Ave, Owings Mills, MD 21117

## PRELIMINARY AGENDA & SAMPLE ATTENDEE LIST

### Tuesday, September 24, 2024

2:00 pm **Welcoming Remarks, Attendee Introductions/Activity Reports**

3:00 pm **Operations & Innovation:**

#### **Harnessing Internal Assets to Increase Revenue as the Result of Innovation and Operational Planning**

Tim Heaton, Managing Member, Heaton Consulting and Mark Rothwell, President, The Brand Matters Technology and customer expectations are continually evolving. To maintain or grow market share, you will at some point be facing decisions on big operational investments. What role does the brand promises, company long-term strategy, external stakeholder feedback and customer value, among other items, weigh on these major decisions? Understand how to improve decision-making and outcomes when pursuing large operational investments.

4:00 pm **Adjourn for the Day**

6:30 pm **Hosted Networking Dinner**

### Wednesday, September 25, 2024

8:30 am **Continental Breakfast Hosted by Baltimore Life**

9:00 am **Presentation TBA**

10:00 am **Facilitated Discussion**

Topics will be pre-submitted by participants. Sample topics from last year's meeting include:

- Balancing the benefits of AI and the need for human capital in the customer experience
- Navigate swift technological advances and not so swiftly evolving compliance and regulatory requirements
- Electronic Policy Delivery - challenges to implement?

11:30 am **Networking Luncheon Hosted by Baltimore Life**

12:30 pm **Meeting Adjourns**

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## LIC OPERATIONS COMMITTEE MEETING

### SAMPLE ATTENDEE LIST (from last year)

Allen Bailey & Associates - Jim Mathur, Actuarial Consultant  
 Allen Bailey & Associates - Tom Wurfel, President  
 American Fraternal Alliance - Kendra Ansley, Managing Director (Remote)  
 American Savings Life Insurance Company - Michael Frahm, Senior Vice President (Remote)  
 American Savings Life Insurance Company - Paul Whetten, EVP/COO  
 Balanced Growth Enterprises - Ted Mackenzie, Business Development Executive  
 Benekiva - Brent Williams, Founder & CEO  
 Benekiva - James Preston, Sr. National Account Executive  
 Catholic Life Insurance - Brooke Gullion, Assistant Vice President, Operations  
 Catholic Life Insurance - Christopher Belz, Executive Vice President/Corporate Relations  
 Catholic Life Insurance - Frank Gentile, Senior Vice President, Chief Underwriter  
 Catholic Life Insurance - Heather Kennedy, Membership Service Supervisor  
 Catholic Life Insurance - Irena Stojan, Claims Director (Remote)  
 Catholic Life Insurance - Joy Burditt, Assistant Vice President of Operations  
 Catholic Life Insurance - Lisa Farr, Imaging-Mailroom Supervisor-Operations  
 Catholic Life Insurance - Mike Belz, President and Chief Executive Officer  
 Catholic Life Insurance - Peggy Von Kaufman, Assistant Vice President, Operations  
 Catholic Life Insurance - Sarah Jones, Policy Issue Supervisor  
 Catholic Life Insurance - Susan Skrzycki, Assistant Vice President, Operations  
 Catholic Life Insurance - Tricia Michalek, Vice President - Operations  
 Catholic Life Insurance - Zachary Trevino, Director of Process Improvement  
 Catholic Order of Foresters - Joni Kazmierczak, VP of Operations  
 Columbian Financial Group - Kelly Klink, Assistant Vice President, Corporate Projects and Customer Service  
 CSA Fraternal Life - Nick Kosmas, Interim Secretary / Treasurer  
 ELCO Mutual Life and Annuity - Bill Bruce, Vice President of Operations  
 ELCO Mutual Life and Annuity - Paul Grawe, Chief Financial Officer  
 Equisoft - Michael Zelesnik, Vice President, Insurance Solutions  
 GPM Life - Debbie Skarda, Vice President Claims and Records  
 GPM Life - Gregory Lawler, CIO  
 GPM Life - Jay Moyer, Vice President - Director of Marketing  
 GPM Life - Pam Hutchins, Senior Vice President and Chief Actuary  
 Heritage Life Insurance Company - Michelle Casaus, Asst VP of Operations  
 Hermann Sons Life - Samantha Kelley, Vice President of Operations and COO  
 illustrate inc - Lyndon Edwards, President  
 iPipeline - Michael Deck, Software Sales Director  
 iPipeline - Roy Goodart, VP, Product Management  
 Kemper - Rachelle Knau, AVP Policy Administration  
 Kemper - Saud Khan, Leader- MBA Leadership Development Program  
 KSKJ Life - Lauren Rainey, AVP of Operations  
 Liberty Bankers Insurance Group - Michelle Clements, Senior Vice President  
 LIC - Audrey Wittenburg, Associate Director  
 LIC - Dean Lambert, Executive Director  
 Manage My Limited - Mark Moran, Chief Product Officer

Management Data, Inc. - Jeremy Bourland, Vice President Business Development  
Management Research Services, Inc. - Steve DeLonge, Director of Client Success  
Navy Mutual - Lindsay McFarland, Vice President, Member Services (Remote)  
NSS Life - Al Burns, Chief Information Officer  
Puritan Life insurance Company of America - Heather Miller, VP - Operations  
QLAdmin - Greg Garza, CTO & Director of Software Development  
QLAdmin - Kat Correa, Chief Marketing Officer  
Royal Neighbors of America - Matt Stoefen, CSC Director  
Security National Life - Jon Meredith, Director of Policy Administration  
Slovene National Benefit Society - Terry Champ, Chief Information Officer  
Solutions3000 - Brandon Nichols, Owner  
Solutions3000 - Toni Schuster, Owner  
SPJST - Brett Wheeler, Senior Accountant (Remote)  
SPJST - Roy Vajdak, Controller  
Tapp Solutions - Michael Potter, CEO  
Trilogy Actuarial Solutions - Amy Phillips, Partner