

Advanced Markets & Underwriting Conference

Innovate & Elevate – Strategies for Success

Sunday, April 27		
2:00 – 5:00pm	<p>Pre-Conference Workshop: How Artificial Intelligence is Changing Our Lives & Our Business</p> <p>Moderator: Rick Buteau, Senior VP Operations, LIBRA Insurance Partners</p> <p>Speakers:</p> <p>Foundational Introduction & Demystification of Artificial Intelligence Nicholas Bowman, CFP, MS, CEP, Co-Founder, xcela.ai</p> <p>Artificial Intelligence in Healthcare – Implications for Life Insurance Dr. Gina Guzman, MD, DBIM, FAAIM, FALU, FLMI, VP & Chief Medical Director, Munich RE Life</p> <p>Carrier Applications for Artificial Intelligence in Underwriting, New Business, Policy Owner Services, & Other Areas of Use Doug Armstrong, PhD, Data Science Senior Manager, Securian Financial Kelly Jackson, Director, Data Analytics, Principal Financial Group</p> <p>Cutting Edge Artificial Intelligence Tools for Advisors Rick Buteau, Senior VP Operations – LIBRA Insurance Partners Nicholas Bowman, CFP, MS, CEP, Co-Founder – xcela.ai Robert Strauss, JD, Founder & CEO – RePredict Peter Kaplan, Executive VP, Planning & Insurance Solutions, Integrated Financial Partners</p>	Waterside 1
5:30 – 6:30pm	<p>Welcome Reception Sponsored by: Prudential Financial</p>	Waterside 2, 3
7:00pm	<p>Carrier Dine-Arounds</p>	Local Restaurants
Monday, April 28		
7:15 – 8:00am	<p>Breakfast Sponsored by: Protective Life</p>	Pre-function Hallway, Waterside 2, 3
8:00 – 8:30am	<p>Welcome – Innovate & Elevate: Strategies for Success</p> <p>Speakers: Gonzalo Garcia, CLU, Managing Partner, AgencyONE Jason Lea, CFP, CEO, Brokers Service Marketing Group (BSMG) David Wright, JD, VP Sales, Business Underwriters Associates (BUA)</p>	Waterside 1
8:30 – 9:30am	<p>Executive Panel Discussion – The State of the Insurance Industry</p> <p>Moderator: Gonzalo Garcia, CLU, Managing Partner, AgencyONE Speakers: Hector Martinez, President, John Hancock Life Insurance Dennis Martin, President, OneAmerica Financial</p>	Waterside 1
9:30 – 10:15am	<p>It's Not All About PRICE</p> <p>Speaker: Colin Devine, CFA, CMA, CFP, Senior Industry Advisor & Research Fellow, Alliance for Lifetime Income's Retirement Income Institute</p>	Waterside 1

10:15 – 10:30am	Break Sponsored by: Mutual of Omaha	Pre-function Hallway
10:30 – 11:00am	Regulatory Policy, Tax Policy, & Politics in 2025 <u>Speaker:</u> Jennifer Fox, VP, Federal Affairs, FINSECA	Waterside 1
11:00am – Noon	Estate Planning, the Great Wealth Transfer, & the Business Owner Market: What Does It All Mean in Today's World? <u>Speaker:</u> David York, JD, CPA, Managing Partner, York Howell	Waterside 1
12:00 – 1:00pm	Lunch & Networking Break Sponsored by: Nationwide Insurance	Pre-function Hallway, Waterside 2, 3
1:00 – 2:30pm	Strategies for Success - Sales Ideas from Your Peers	Waterside 1
2:30 – 3:00pm	Navigating Business Opportunities in 2025 & Beyond <u>Speaker:</u> Tracey Ullom, JD, LLM, CLU, Associate Counsel, Advanced Markets, John Hancock Life Insurance	Waterside 1
3:00 – 3:45pm	Networking Break – Join Your Sponsors & Peers for Individual or Group Interactive Time Sponsored by: Principal Financial Group	Pre-function Hallway, Waterside 2, 3
3:45 – 4:15pm	Ideas to Inspire Sales & Grow Your Business <u>Session 1: Gift of a Lifetime</u> - Jim Williams, ChFC, CLU, RVP & Derrik Bullen, CLTC, Securian Financial <u>Session 2: Finding Defined Benefit Options</u> – Richard Novak, RVP, Advanced Markets, Security Mutual Life Insurance <u>Session 3: Cornerstone Home Equity Insurance/ Investment Funding Solutions (CHEIFS)</u> – Dan Anderson & Craig Corn, Co-Founders & Chairmen, Cornerstone Financing, CHEIFS	Waterside 1
4:15 – 5:00pm	Strategies to Improve Wellness & Increase Longevity <u>Introduction:</u> Dennis Martin, President, OneAmerica Financial <u>Speaker:</u> Dr. Marc Milstein, MD, Author, Brain Health Researcher Sponsored by: OneAmerica Financial	Waterside 1
6:30 – 9:00pm	AgencyONE/ BSMG/ BUA Reception & Dinner Sponsored by: John Hancock Life Insurance	La Vie Restaurant
Tuesday, April 29		
7:15 – 8:00am	Breakfast Sponsored by: Mass Mutual	Pre-function Hallway, Waterside 2, 3
8:00 – 8:45am	More Ideas to Inspire Sales & Grow Your Business <u>Session 1: Don't Build Cash in Life Insurance – It's Too Expensive!</u> Dan Sullivan, CLU, RVP, Mid-Atlantic Region, Corebridge <u>Session 2: The Next Best Thing to a Crystal Ball</u> - Brad Shepard, CLTC, Regional Director, Individual Life & Financial Services, Care Solutions, OneAmerica Financial <u>Session 3: Something Old, Something New: The Power of Policy Review</u> Scott Johnson, CLU, Field VP, Marketing Organizations, Pacific Life Insurance Company	Waterside 1

8:45 – 9:15am	Enduring Estate Planning: A Lasting Legacy for Today’s Clients <u>Speaker:</u> Brett Berg, JD, LLM, Vice President, Advanced Planning, Prudential Financial	Waterside 1
9:15 – 10:30am	SPG Underwriting: Meet the Team & Introduce Strategy Moving Forward <u>Speakers:</u> Jason Lea, CFP, CEO, Brokers Service Marketing Group (BSMG) Gonzalo Garcia, CLU, Managing Partner, AgencyONE Dennis Bartos, PA, Partner & Chief Medical Underwriter, AgencyONE Tim Moynihan, Senior Vice President, Director of Risk Appraisal, Brokers Service Marketing Group (BSMG) Kim Seppay, FALU, FLMI, ACS, Vice President, Underwriting Operations & Strategy, Brokers Service Marketing Group (BSMG) Bill Wheeler, FALU, FLMI, VP & Underwriting Manager, Protective Life Suzanne Haviland, FALU, CLU, ChFC, Underwriting Technical Director, Consumer Markets Division, Life Underwriting, Pacific Life Insurance Company	Waterside 1
10:30 – 10:45am	Break	Pre-function Hallway, Waterside 2, 3
10:45am – Noon	From Depravity to Dignity - Bobby Samuelson <u>Speaker:</u> Bobby Samuelson, Executive Editor, Life Product Review and President & CEO, Life Innovators	Waterside 1
Noon	Closing & Departures	Waterside 1