

## Advanced Markets & Underwriting Conference

### Innovate & Elevate – Strategies for Success

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

10:15 – 10:30am	<b>Break</b> Sponsored by: Mutual of Omaha	Pre-function
10:30 – 11:00am	<b>Regulatory Policy, Tax Policy, &amp; Politics in 2025</b> <u>Speaker:</u> Jennifer Fox, VP, Federal Affairs, FINSECA	Waterside 1
11:00am – Noon	<b>Estate Planning, the Great Wealth Transfer, &amp; the Business Owner Market: What Does It All Mean in Today's World?</b> <u>Speaker:</u> David York, JD, CPA, Managing Partner, York Howell	Waterside 1
12:00 – 1:00pm	<b>Lunch &amp; Networking Break</b> Sponsored by: Nationwide Insurance	Pre-function Hallway, Waterside 2, 3
1:00 – 2:30pm	<b>Strategies for Success - Sales Ideas from Your Peers</b>	Waterside 1
2:30 – 3:00pm	<b>Navigating Business Opportunities in 2025 &amp; Beyond</b> <u>Speaker:</u> Tracey Ullom, JD, LLM, CLU, Associate Counsel, Advanced Markets, John Hancock Life Insurance	Waterside 1
3:00 – 3:45pm	<b>Networking Break – Join Your Sponsors &amp; Peers for Individual or Group Interactive Time</b> Sponsored by: Principal Financial Group	Pre-function Hallway, Waterside 2, 3
3:45 – 4:30pm	<b>Ideas to Inspire Sales &amp; Grow Your Business</b> <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
4:30 – 5:15pm	<b>Strategies to Improve Wellness &amp; Increase Longevity</b> <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	<b>AgencyONE/ BSMG/ BUA Reception &amp; Dinner</b> Sponsored by: John Hancock Life Insurance	La Vie Restaurant

## Tuesday, April 29

7:15 – 8:00am	<b>Breakfast</b> Sponsored by: Mass Mutual	Pre-function Hallway, Waterside 2, 3
8:00 – 8:45am	<b>More Ideas to Inspire Sales &amp; Grow Your Business</b> <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	<p><b>Enduring Estate Planning: A Lasting Legacy for Today’s Clients</b>  <u>Speaker:</u> Brett Berg, JD, LLM, Vice President, Advanced Planning, Prudential Financial</p>	Waterside 1
9:15 – 10:30am	<p><b>SPG Underwriting: Meet the Team &amp; Introduce Strategy Moving Forward</b>  <u>Speakers:</u> Jason Lea, CFP, CEO, Brokers Service Marketing Group (BSMG)  Dennis Bartos, PA, Partner &amp; Chief Medical Underwriter, AgencyONE  Tim Moynihan, Senior Vice President, Director of Risk Appraisal, Brokers Service Marketing Group (BSMG)  Kim Seppey, FALU, FLMI, ACS, Vice President, Underwriting Operations &amp; Strategy, Brokers Service Marketing Group (BSMG)  Bill Wheeler, FALU, FLMI, VP &amp; Underwriting Manager, Protective Life  Suzanne Haviland, FALU, CLU, ChFC, Underwriting Technical Director, Consumer Markets Division, Life Underwriting, Pacific Life Insurance Company</p>	Waterside 1
10:30 – 10:45am	<b>Break</b>	Pre-function Hallway, Waterside 2, 3
10:45am – Noon	<p><b>From Depravity to Dignity - Bobby Samuelson</b>  <u>Speaker:</u> Bobby Samuelson, Executive Editor, Life Product Review and President &amp; CEO, Life Innovators</p>	Waterside 1
Noon	<b>Closing &amp; Departures</b>	Waterside 1