ADVISORY COMMITTEE

COMMITTEE CHAIR
Tracy L. Rich
Guardian

MEMBERS
Richard Braun MD, FLMI
SCOR Global Life Americas
Scott E. Creutzmann
RiverSource Life Insurance Company
James D. Gallagher
John Hancock
Jerry Hitpas, CFA
Trustmark Companies
Gary Jenkins
Voya Financial
Rosalie M. Mastropolo
MassMutual
Jeff Poulin
Canada Life Re
Melissa Roddy
Genworth Financial
James Rousey
UTG, Inc.
Alison Weiss
MassMutual

ACLI MEMBERS
Dirk Kemphome
American Council of Life Insurers
Linda H. Cunningham
American Council of Life Insurers
David C. Turner
American Council of Life Insurers

ACCREDITATION

CLE: The annual conference is fully accredited in most jurisdictions requiring mandatory continuing legal education. Forms for CLE credits are available at the sessions.

CPE: ACLI is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.

Program Level: Intermediate (participants have had some exposure to the subjects). Curriculum will build on basic skills to relate fundamental principles to practical situations and extend them to a broader range of application.

Learning Objectives: Upon completion, participants will better understand: current challenges that could influence the strength of the sector, a outlook and strategy for investing in fixed income, recent trends in M&A activity, developing and managing blocks of fixed index annuities business, investment related issues such as RBC and SVO ratings, factors in investment decisions in a low rate environment, proposed changes to the BCRM and detail on the BCAR model, the new institutional prime funds rule and its implication for insurers, and the business case and finance fundamentals for the solar market.

Program Prerequisites/Advance Preparation: No advanced prerequisite or preparation is required.

Instructional Method: Group presentations with instructor in room with participants.

Recommended CPE Credits: 9.0 hours.

Sponsored activities are measured by program length, with one 50-minute period equal to one CPE credit. One-half CPE credit increments (equal to 25 minutes) are permitted after the first credit has been earned in a given learning activity. Not all state boards have adopted this method of calculation; some may not accept half-credit increments.

ANTITRUST STATEMENT

The American Council of Life Insurers is committed to adhering strictly to the letter and spirit of the antitrust laws. Meetings conducted under the ACLI’s auspices are designated solely to provide a forum for the expression of various points of view on topics described in the agenda. Under no circumstances shall ACLI meetings be used as a means for competing companies to reach any understanding, expressed or implied, which tends to restrict competition, or in any way, to impair the ability of members to exercise independent business judgment regarding matters affecting competition.

© 2016 American Council of Life Insurers