ENCORE

EDUCATE + CELEBRATE

DECEMBER 15-16, 2020

VIRTUAL EVENT

ROUNDTABLE DISCUSSION TOPICS & TIPS

December 16, 2020 | 10:30 a.m. – 12:00 p.m. CST

Tips for a Successful Roundtable Experience.

- Click the link at 10:00 a.m. CST to get situated in the event.
- Print this document for reference the day of the event.
- Please be sure you are logged out of your company's VPN.
- Close out of all browsers and programs, especially those that could be using your camera and microphone. If you do not do this, it could cause some problems.
- When you enter the event, please be sure to turn your camera and microphone on for optimum networking ability.
- We recommend you use the link below to test your microphone, camera, speakers, browser, hardware, and internet connection prior to the event at: **https://geartest.remo.co**

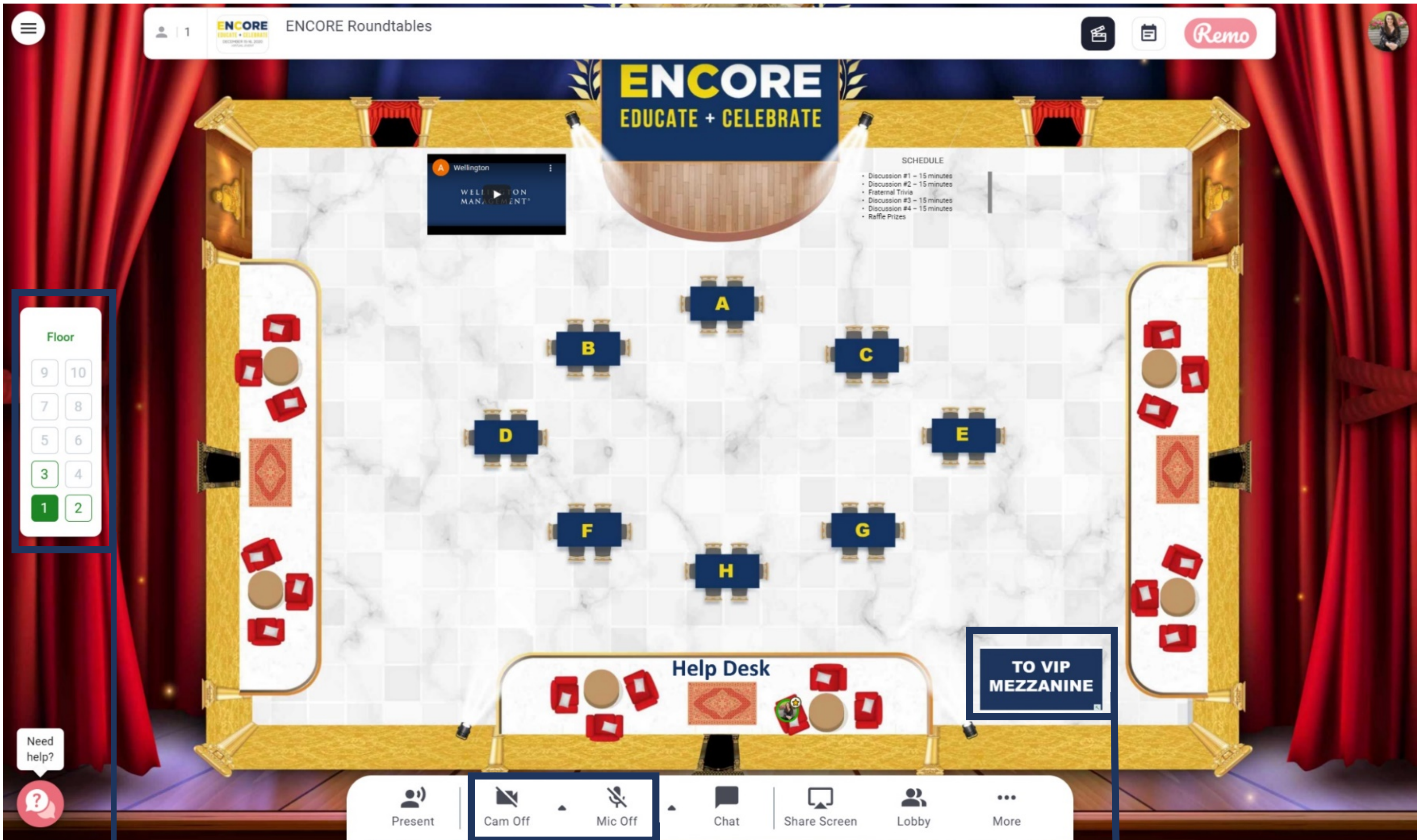
If you have trouble logging in, please contact Dreyson Boyd at 317.876.4317 or info@fraternalalliance.org. You can also visit the Help Desk when you arrive in the "theater".

Browser Compatibility

On **Mac** desktops and laptops, Remo is compatible with Chrome, Firefox, and Safari.

On **Windows 10** desktops and laptops, Remo is compatible with Chrome and Safari.

ENCORE Roundtables Floorplan



Switch floors by clicking the floor number you'd like to be on.

Turn your camera and microphone on here.

CEOs click here to go to the VIP Mezzanine.

First Floor Discussion Topics

Table	Discussion Topic	Host	Company	Raffle Item
1A	Practical Application: Thriving Through Technology	Eric Swanson	Illustrate Inc.	Beats Solo 3 Wireless Headphones
1B	General Discussion on Economics	Kyle Timmerman	Parkway Advisors, L.P.	Donations to members' charities and iPad
1C	Culture Shock: Impact of COVID on Accounting and Finance Departments	Richard Brough, CPA	BKD CPAs & Advisors	
1D	DIY Videos as Part of Your Marketing Strategy	Kat Correa	QLAdmin	$100 donation to your fraternal's education fund per round- $400 total
1E	Fraternal Innovations	Jill Weaver	Modern Woodmen of America	
1F	How to Handle Underperforming Board Members: Retire, Cancel or Train?	Pete Thrane	Stinson	One Dozen Golf Balls & Golf Superstore Gift Card
1G	Best Virtual Community Service Event	Open Forum		
1H	Best Shows to Binge	Open Forum		

Second Floor Discussion Topics

Table	Discussion Topic	Host	Company	Raffle Item
2A	COVID-19 Pandemic Impacts on E&O Insurance Market	Matt Johnson	CalSurance Associates, A Division of Brown & Brown	
2B	Work from Anywhere: Tips and Techniques	Jason Bordui	Balanced Growth Consulthing	iPad
2C	2021 Statutory Valuation Rate Changes – What to Expect for Life Business in the New Year	Will Abram	Allen Bailey & Associates, Inc.	$200 Gift Card to Perini Steaks
2D	Supporting Your Communities Virtually	Courtney Madden	Wellington Management Company	
2E	Advocacy 365: Telling Your Story to Policymakers (Includes Advocacy Scavenger Hunt!)	Tim Saccoccia	Knights of Columbus	
2F	Operational Challenges	Scott Schuetz	GCU	
2G	Incenting Chapters	Open Forum		
2H	Favorite Holiday Tradition or Food	Open Forum		

Third Floor Discussion Topics

Table	Discussion Topic	Host	Company	Raffle Item
3A	The Future of Digital Transformation—A Fraternal Perspective	Marc Blanchard	Equisoft	
3B	Ensuring a Secure and Productive Remote Work Environment	Chip Whiteside	Andesa Services	Mini Apple iPad
3C	Fraternal Investing Trends and Implications for 2021	Marc Mercurio	Macquarie Investment Management	Yeti Mug, Bluetooth Speaker, or Patagonia Sweater (Choice of 1)
3D	Insights on Custody & Reporting Services	John G. Harrington	Fifth Third Bank/Fifth Third Securities	Yeti Rambler and Colster Set
3E	Virtual Conventions Dos & Don'ts	Joni Kazmierczak	Catholic Order of Foresters	
3F	Who Among You Wears Many Hats?	Barbara Janowski	Gleaner Life Insurance Society	
3G	Scholarship Programs During Pandemic	Open Forum		
3H	Your Unusual Hobby	Open Forum		

3rd floor

Fourth Floor Discussion Topics

Table	Discussion Topic	Host	Company	Raffle Item
4A	Digital Transformation and Customer Service	Joe Lee	RSM US LLP	iPad
4B	Under Pressure: Net Investment Income	Tim Bourdon	New England Asset Management	Fitbit
4C	The Shift to Work at Home	Kimberly Duke	LIDP Consulting Services	
4D	Engagement	Jaime Linden	Gleaner Life Insurance Society	
4E	Virtual Camp for Fraternals	Sally Krochalk	Catholic Financial Life	
4F	Social Media Activities in 2020	Open Forum		
4G	Cancelled Vacations	Open Forum		
4H	Your Strategies to Keep Your Family's Spirit Up	Open Forum		

4th floor

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VIP/CEO Mezzanine Topics

Table	Discussion Topic	Host	Company
MA	Direct Election Structure	Todd Martin	Stinson
MB	Succession Planning & Leadership Training	Andrew Paone	Wellington Management Company
MC	Fulfilling the fraternal promise – integrating digital tools to better serve members, agents, employees, and the community.	David Nicolai	Equisoft
MD	Fraternal Potpourri	Allison Koppel	
ME	What Keeps You Up at Night?	Val Grubb	
MF	Strategic Planning	Theron Holladay	Parkway Advisors, L.P.

Allen Bailey and Associates, Inc.

Will Abram | Consulting Actuary
wabram@allenbailey.com

Raffle Item: $200 gift card to Perini Steaks

Since 1987, the actuarial consulting firm of Allen Bailey & Associates, Inc. has specialized in helping Fraternal Societies enhance their product portfolios to attract new members. We assist our clients with financial reporting, strategic alternatives, compliance, experience analysis, illustration software, and more. We pride ourselves on providing timely value-added consulting services. For more information on AB&A or to inquire how we can provide exceptional service to your society, please email contact@allenbailey.com or visit us at www.allenbailey.com.

Andesa Services

Chip Whiteside | Senior Manager, IT Risk and Architecture
chip.whiteside@andesaservices.com

Raffle Item: Mini Apple iPad

Andesa Services, Inc. provides cloud-based policy administration and support services for life insurance and annuity carriers. Our flexible Software as a Service (SaaS) model allows fraternal carriers of all sizes to realize the benefits of a secure, modern infrastructure, fully integrated administration, reporting and illustration systems and industry-leading agent e-app portal and member self-service portal. The Andesa policy administration platform was specifically designed for the Fraternal market which includes an integrated Fraternal Member Management solution. This tool allows fraternal carriers the ability to capture and maintain information on its members, chapters/regions/lodges as well as volunteer hours, social memberships, donations, scholarships, etc. Andesa's integrated approach to policy administration results in dramatic efficiency gains, significantly reduced hardware costs, highly predictable support expenses, streamlined client service, mitigated compliance risks and speed-to-market for new products and lines. Andesa's clients include several fraternal carriers as well as 7 of the top 13 life insurance carriers including numerous small to mid-sized insurers. Visit www.andesaservices.com to learn more.

Balanced Growth Consulting

Jason Bordui | President & Chief Client Strategist
jason@balancedgrowth.com

Raffle Item: iPad

Balanced Growth is a strategy, innovation, and operations consulting firm. Our mission is to create enduring value for organizations who are driven by purpose and profit through strategic and operational innovation. In collaboration with client leaders and teams, we design, implement, and accelerate high-impact operational, technology, and innovation solutions to enable measurable results and achieve breakthrough performance.

BKD CPAs & Advisors

Richard ‘Ricky’ Brough, CPA | Director
rbrough@bkd.com

BKD National Insurance Services Practice is the accounting firm of choice for hundreds of insurance companies and fraternal benefit societies across the country, providing audit & tax services, cybersecurity consulting, internal audit, big data & analytics and more. Ranked by A.M. Best as a top-tier assurance provider in the insurance industry, BKD helps companies manage risk, navigate the complex regulatory environment and add value for shareholders and policyholders. With a strong commitment to the industry, BKD also is a proud sponsor of the American Fraternal Alliance. To learn more, we invite you to visit bkd.com/insurance. Everyone needs a trusted advisor. Who’s yours?

CalSurance Associates, A Division of Brown & Brown Program Insurance Services, Inc.

Matt Johnson | Marketing Director
mjohnson@calsurance.com

CalSurance is proud to be the endorsed broker for the American Fraternal Alliance member insurance programs, including Agents' E&O, D&O, Employment Practices, Fiduciary, Outside Directorship and Professional Liability. We take pride in offering our clients the depth and power of our insurance knowledge while still providing the personal touch of a smaller organization.

Equisoft

Marc Blanchard | Business Innovation Specialist
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David Nicolai | Vice President, Insurance Solutions USA | **In Mezzanine**
david.nicolai@equisoft.com

Raffle Item: Fitbit

Founded in 1994, Equisoft is a global provider of advanced digital solutions in life insurance and wealth management. Recognized as a valued partner by over 50 of the world's leading financial institutions in 15 countries, Equisoft offers innovative front-end applications, extensive back-office services and a unique data migration expertise. The firm's industry-leading products include CRM, financial needs analysis, asset allocation, quotes and illustrations, electronic application, agency management systems, as well as customer, agent and broker portals. Equisoft is also Oracle's main global partner for the Oracle Insurance Policy Administration platform. With its business-driven approach, deep industry knowledge, state-of-the-art technology, and a growing team of over 400 specialized resources based in the USA, Canada, Latin America, South Africa and India, Equisoft helps financial institutions tackle any challenge in this new era of digital disruption.

Fifth Third Bank / Fifth Third Securities

John G. Harrington | Business Development, IT&C
john.harrington3@53.com

Raffle Item: Yeti Rambler and Colster Set

Fifth Third Bancorp (FITB) is a diversified financial services company that operates banking centers throughout the United States. The company's principal businesses includes retail banking, commercial banking, investment servicing processing (partial list). Services specific to the Fraternal Community include specific Fixed-Income Services and Trust/Custody Services. This includes specific fixed-income offerings that are provided in a principal capacity and priced at the actual market-value of the bond - there is no management fee for these services. Our Institutional Trust & Custody services offer a single point of contact for asset servicing and settlement needs, designed to maximize efficiency, reduce risk, and minimize costs.

Heritage Life Insurance Company

Peter McPherson | Senior Vice President
peter.mcpherson@heritageli.com

Heritage Life Insurance Company provides life and annuity reinsurance solutions to small- and medium-sized organizations. Heritage offers a unique combination of financial stability, product expertise and organizational efficiency along with a streamlined operating model. This combination allows Heritage to competitively support direct writers to safely achieve their objectives, in both their operations and communities.

illustrate inc

Eric Swanson | Vice President
eric.swanson@illustrateinc.com

Raffle Item: Beats Solo 3 wireless Headphones

Founded in 1989, by our current Chairman Zahir Dhalla, our organization began its journey by building Universal Life illustration systems for a variety of carriers. Throughout the years, our development approach has evolved to include state-of-the-art engines, rules, and editors utilizing modern processes and technology to provide a base for our OPUS (One Point Unified System) line of solutions. Our core quoting and illustration system strengths and expertise, for new business and inforce, have been expanded to include related digital POS solutions covering eForms, eApps, Needs Analysis, Mobile, Case Management, User Portals and more. Privately owned for over 30 years, our organization continues to be 100% focused on the North American Life Insurance industry, and solidly committed to continuing to invest in our people and technology. As an organization, we at illustrate inc are extremely privileged and proud to have a highly skilled, experienced, innovative, and motivated team who are unabashedly committed to the success of our customers and organization. With core values that include integrity, collaboration, diversity, and a strong corporate culture, we're committed to building long term customer and industry partnerships based on performance, trust, and accountability. To learn more, visit www.illustrateinc.com.

LIDP Consulting Services

Kimberly Duke | Chief Marketing Officer & Director of Sales
kimberly.duke@lidp.com

LIDP provides award-winning, innovative solutions to the life and annuity industry. Our policy administration system, Titanium, is built entirely on the JEE platform and provides the stability, portability, and scalability necessary to power any life insurance enterprise. Designed to work with your existing hardware, software, and databases, Titanium is truly unique. A complete solution from illustrations through contract maturity, billing, agent compensation & licensing claims, and underwriting and issue. Titanium provides for STP and is completely SOA enabled. Titanium processes all life, health, annuity products, including: fixed, variable, equity, indexed, traditional, non-traditional, individual, and worksite. LIDP has been in business for over 35 years and is backed by industry experts who collectively have over 600 years of experience on our systems. LIDP is has a 100% success rate in implementation and conversion projects. Our solution is available in the cloud or onsite.

Macquarie Asset Management

Marc Mercurio | Senior Relationship Manager – Insurance Solutions
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Raffle Item: Yeti mug, Bluetooth speaker, or Patagonia sweater (choice of 1)

Macquarie is a diversified global financial services firm with over 15,000 employees in 31 markets. Macquarie is the world’s largest manager of infrastructure assets, a top 50 global asset manager, and a top 10 global insurance asset manager with decades of experience working with insurance companies to solve complex issues. By combining deep, specialized asset management capabilities across public and private markets with dedicated insurance resources, Macquarie has a unique ability to design, develop, and implement custom solutions for insurers.

New England Asset Management

Tim Bourdon, New Business Development Professional
tim.bourdon@neamgroup.com

The mission of New England Asset Management (NEAM) is to be integral to the success of our insurance industry clients by providing investment management solutions through a team of skilled professionals dedicated to delivering exceptional client service. Our insurance investment management solutions include asset management, enterprise risk and capital management, capital and risk analytics, and investment accounting and reporting services.

Optimum Re Insurance Company

Terrence Weiser | Assistant Vice President, Business Development
terrence.weiser@optimumre.com

Optimum Re Insurance Company (ORIC) has been building successful partnerships since 1987. We have maintained steady growth and profitability, earning a solid reputation as a reinsurer that provides efficient and professional client service. Client Focus is a core value at ORIC and is affirmed by our clients consistently ranking us as one of the best reinsurers in industry surveys. ORIC has served the Fraternal market for many years, laying the foundation for our successful partnerships. ORIC looks forward to future development opportunities with our Fraternal partners for years to come. ORIC offers comprehensive reinsurance solutions, competitive pricing, full underwriting services, research & development and an individual record administration system which enhances its risk management services for Life, Critical Illness and supplementary products. We are a leader in the Critical Illness and Final Expense market through our experience and expertise in risk management and claims adjudication. We continue to successfully expand our presence in the market through organic growth, block acquisitions, and personalized solutions tailored to increase our growth for our clients. ORIC has a rating of A- excellent by AM Best.

Parkway Advisors L.P.

Kyle Timmermann | Director of Consulting
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Theron Holladay | Sr. Vice President and CEO | **In Mezzanine**
theron.holladay@parkwayadvisors.com

Raffle Item: Donations to members' charities and iPad

With a consultative focus and over 100 insurance services Parkway works as an extension of your team. Our focus is on service to your fraternal organization and the members you serve. Investment Management Services: Net Investment Income, Surplus Volatility, RBC, ALM, Diversification Insurance Consulting Services: ERM, AM Best, Peer Analysis, Board Education, Portfolio Review Investment Statutory Reporting: Schedule D, IMR/AVR, Investment G/L entries, What/If scenarios.

QLAdmin Solutions

Kat Correa | CMO
kcorrea@qladmin.com

Raffle Item: $100 donation to your Fraternal's education fund

Offering complete life, health and annuity policy administration, plus Medicare Supplement claims auto-adjudication. QLAdmin services the entire policy lifecycle from new issue to termination. Third-party integrations enable agent quoting tools, mobile applications, illustrations and e-applications. Key features include agent and policyholder web portals, built-in document management, accounting integration, and full valuation/reserves. Serving nearly 50 clients in the United States, Canada, Central America, and the Caribbean. QLAdmin is a proven and reliable solution with 100% US-based development and peerless technical support.

RSM US LLP

Joe Lee | Senior Manager
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Raffle Item: iPad

Insurance leaders face a challenging climate as they seek to balance increased demands, digital transformation, and the need to sustain growth. RSM industry specialists understand the complexities insurance companies are facing. We're the fifth largest accounting, tax and business consulting firm in the nation, with 87 offices and more than 12,000 employees. We’re focused on serving fraternal insurance companies nationwide. Our team of knowledgeable insurance industry professionals can help you with your accounting, tax and business consulting needs.

Stinson Leonard Street LLP

Peter Thrane | Attorney Shareholder
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Todd Martin | Partner | **In Mezzanine**
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Raffle Item: A dozen golf balls & a Golf Superstore gift card

One of the 100 largest law firms in the U.S., Stinson Leonard Street has nearly 500 attorneys and offices in 14 cities. Attorneys in our Insurance practice have spent their careers solving the legal and regulatory dimensions of insurers’ and fraternals’ business problems. Many of our attorneys have previous experience in regulatory agencies and the insurance industry, managing legal matters unique to insurance businesses. This perspective enables us to efficiently and effectively handle the broad range of legal challenges faced by insurers and fraternals. We are routinely involved in insurance company formations; all manners of insurance transactions and dissolutions; alternative risk transfer arrangements; coverage matters; regulatory applications; distribution; and administration arrangements and advocacy before regulators, the courts and arbitration panels. For more information, please visit www.stinsonleonard.com or call Pete Thrane at 612-335-1779 or contact him via email at pete.thrane@stinsonleonard.com.

Wellington Management Company LLP

Courtney Madden | Relationship Manager
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Andrew Paone | Managing Director | **In Mezzanine**
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An independent private partnership, founded in 1928, whose sole business is investment management for institutional clients. The firm's investment expertise spans the global equity, fixed income, currency, and alternatives markets. Wellington Management has $104 billion of assets under management for insurance general account clients. The firm's insurance group of 43 professionals works with 134 insurance company clients. With a long history of working with fraternal benefit societies, we currently manage over $3.4 billion in assets on behalf of 7 fraternals through our Fraternal Investment Program. Insurance client assets are invested using 63 of the firm's various investment approaches involving all major asset classes. We develop customized investment solutions in response to client requests and market opportunities.