# 2017 Round Up

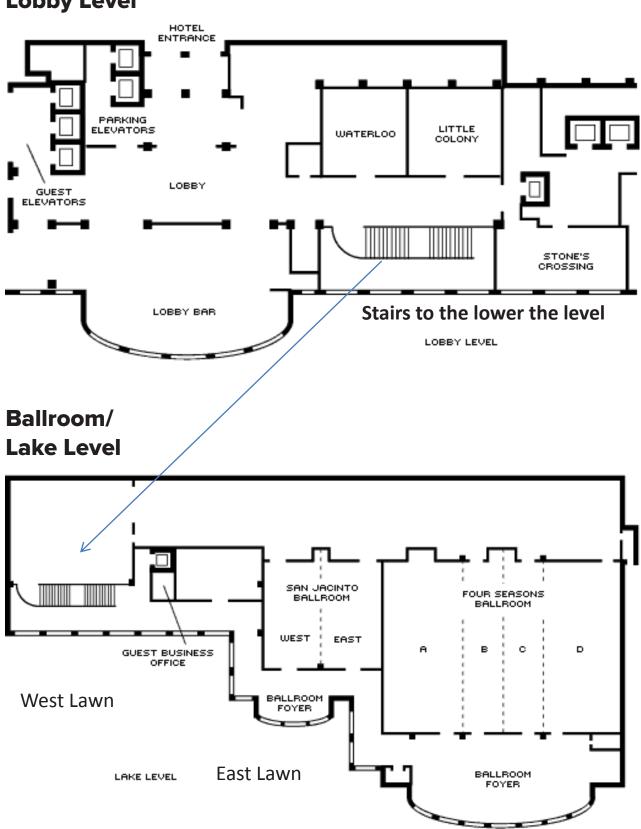
Texas Association of Life & Health Insurers



Celebrate 20 years of TALHI

# **HOTEL MAP**

#### **Lobby Level**





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# **MESSAGE FROM THE CHAIR**

#### Welcome to the 2017 Round Up and Our 20 Year Celebration!



We are excited that you are here to celebrate TALHI's 20 years of serving the life and health insurance industry. We are grateful for your continued support. I believe you will find this year's meeting both memorable and informative.

We've assembled another impressive panel of presenters that includes some of our state's most influential leaders and national industry experts, all of whom will share their insight and forecasts on topics and developments important to our industry.

We will review the successes and challenges of the state's 2017 legislative session and discuss the effect of upcoming regulatory changes. We will explore the state of Texas politics, break-down the trending topics at NCOIL and NAIC, and go in-depth on the burgeoning importance of cybersecurity in our industry.

On the last day of Round Up, we're excited to introduce our first ever "Executive Round Table" sessions. During these sessions, we will look closely at key issues like the impact of the DOL fiduciary

and suitability rules, consider what might be next for the future of the health insurance system in the US, and have an open discussion on our association's priorities for the upcoming year.

As always, we included time in this year's program for networking with your colleagues as well as the opportunity to enjoy the city that is home to our state capitol and known as the "Live Music Capitol of the World."

As we begin this year's event, let us pause to acknowledge the milestones TALHI has accomplished in its twenty years and the continuing progress it is making as a respected advocate and association. The organization's finances continue to be strong and well-managed. Our membership remains stable and TALHI's value as a resource and advocate for our industry is at its highest point since the organization was formed.

Your attendance at the 2017 Round Up reinforces your commitment to TALHI's success. Your support makes possible the leadership, unity and resourcefulness that this organization provides on behalf of all of us and will hopefully do so for another twenty years.

Thank you for being here and for your continued support to make TALHI a respected and effective voice for our industry.

Have a great time!

Sincerely, Susan Jennings TALHI Chair, 2016-2017

# TALHI OFFICERS AND BOARD OF DIRECTORS

#### 2016-2017 BOARD OFFICERS

Susan Jennings

National Life Group ® TALHI Chair

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Kari King USAA

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**Suzanne Loomis** 

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### 2016-2017 BOARD OF DIRECTORS

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**Ted Kennedy** 

AIG

R. Gary Allen

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Tom Mays

Pacific Life

John Camillo

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**Kandice Sanaie** 

UnitedHealthcare

Joan Cleveland

SWBC Life Insurance Company

Lee Spangler

Blue Cross & Blue Shield of Texas

Pam Day

NTA Life Insurance Company

John Stuckemeyer

State Farm Insurance Company

Jerry Hall

Croy-Hall Management

**Mark Williams** 

National Farm Life Insurance Company

# **SCHEDULE OF EVENTS**

## Sunday, September 24, 2017

3:30 p.m.	Board Meeting (San Jacinto East)	
4:30 p.m.	REGISTRATION AND INFORMATION DESK OPENS (San Jacinto Ballroom Foyer)	
5:30 p.m.	Welcome Reception (Four Seasons East Lawn)	
7:00 p.m.	LIPAC Incentive Dinner: LIPAC Incentive Qualifiers Only (Four Seasons West Lawn)	

# Monday, September 25, 2017

6:30 a.m.	Breakfast Opens in Trio Restaurant			
7:30 a.m.	REGISTRATION DESK OPENS (Ballroom A Foyer)			
OPTIONAL ACTIVITIES				
7:00 a.m. – 1:00 p	m.  Golf Breakfast/Tournament/Lunch (Onion Creek Club)  RELIABLE LIFE PACIFIC LIFE  National FARM-LIFE			
9:00 – 11:30 a.m.	Bullock Texas History Museum Optional Outing			
12:00 – 1:30 p.m.	*CLE Lunch and Learn (Stone's Crossing) Wade Cresnoe, Thompson Coe Cousins & Irons, LLP			

CONFERENCE SESSIONS BEGIN (Ballroom A)		
2:00 p.m.	<b>Welcome</b> Susan Jennings, 2016-2017 TALHI Chair	
2:05 p.m.	Texas Politics: A Closer Look  Jim Henson, Texas Politics Project, University of Texas at Austin	
2:45 p.m.	*Panel: Hot Topics at NCOIL and NAIC  The Honorable Tom Considine, CEO, NCOIL  The Honorable Ray Farmer, Secretary-Treasurer, NAIC	
3:30 p.m.	*Cybersecurity Momentum: Today's Landscape, Threats and Best Practices Michael J. Adams, McGuire Woods; Former National Security Advisor, U.S. Navy	
4:15 p.m.	Networking Break  The Anfield Group	
4:45 p.m.	*Legislative Panel and Award Presentation Chairman Kelly Hancock, Texas Senate Chairman Larry Taylor, Texas Senate Chairman John Smithee, Texas House Representative Rodney Anderson Representative Chris Turner	
5:45 p.m.	AFTERNOON SESSION ADJOURNS	

# **SCHEDULE OF EVENTS**

5:45 p.m.	Legislative Appreciation Bundling Reception:  Qualified Donors Only (Waterloo Room)	
6:00 p.m.	Chairman's Reception (San Jacinto Foyer/Terrace)  National Life Group*	
7:00 p.m.	20 <sup>TH</sup> Anniversary Round Up Dinner (San Jacinto Ballroom) <b>(i)</b> Landmark  Admin	

#### Tuesday, September 26, 2017

H. L. Linkson				
7:30 a.m.	REGISTRATION DESK OPENS (San Jacinto Ballroom Foyer)			
8:00 a.m.	Breakfast in the San Jacinto Ballroom			
8:00 a.m.	TALHI 403(b) Task Force (Stone's Crossing)			
Executive Round Table Sessions (San Jacinto Ballroom)				
9:00 a.m.	*Panel: DOL Fiduciary Rule and Suitability Rule Developments  Howard Bard, ACLI  The Honorable Jim Poolman, Indexed Annuity Leadership Council  Jason Mendro, Gibson Dunn			
9:45 a.m.	*Can Healthcare be Fixed? A Discussion on the Future of the Health Insurance System in the U.S.  Mara Osman, AHIP  John Hawkins, Texas Hospital Association			
10:30 a.m.	Networking Break Bravarro))			
10:40 a.m.	*New Regulatory Realities and Future Priorities: Enterprise Risk Reports, Cybersecurity, Unclaimed Property Audits and Beyond  An open discussion with Jennifer and Jay about what happened during the legislative session, how it affects you and your company, as well as what our priorities are for the coming year. With special guest and cybersecurity expert Chris Humphreys, The Anfield Group.			
11:45 a.m.	Conference Adjourns			

\* These sessions are approved for MCLE credit from the State Bar of Texas, for a combined total of 6 hours.

#### **Download the TALHI Round Up Mobile App**

Access the full schedule, speaker bios, attendee info, and other conference information in the palm of your hand!



# **UPCOMING EVENTS**







#### ABOUT EDISON, MCDOWELL & HETHERINGTON LLP

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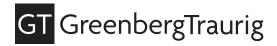
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# LIPAC GOLF TOURNAMENT



presents

17th Annual



Golf Tournament

#### Monday, September 25, 2017

7:00 a.m.	Golfers' Breakfast and Check-In	Onion Creek Club
8:00 a.m.	LIPAC Golf Tournament	Onion Creek Golf Course

Tournament Awards to be presented at Chairman's Reception

also supported by:





# 2016-2017 LIPAC CONTRIBUTORS

TALHI and LIPAC thank you for your generous support during the past year:

#### Inner Circle:

**American Fidelity** 

**American National (ANICO)** 

**GPM Life** 

**MetLife** 

Mutual of Omaha

Trustmark

**USAA** 

The Inner Circle denotes those companies who have donated at least \$1000 in personal or PAC contributions to the TALHI LIPAC since the last Round Up annual meeting.

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National Farm Life

National Life Group

Nationwide

Pacific Life

Primerica

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#### ONE VOICE

LIPAC enhances TALHI's ability to effectively represent your company in the legislative and regulatory arenas and ensures that the voice of our industry is heard in the state's election process.

# VOTE FOR NEW BOARD SLATE AND BYLAWS CHANGES

# Voting is open online through September 26, and will remain open through the Round Up.

Voting is open for the 2017-2018 Board of Directors and officers, as well as for updates to the bylaws that have been approved by the Board.

#### **Board and Officer Elections**

The Nominations Committee has recommended the following slate of candidates for the Board and officers:

- Board of Directors (3-year terms): John Stuckemeyer, State Farm; Joan Cleveland,
   SWBC Life; Gary Allen, Aflac; Eric Dupont, Guardian
- Board of Directors (unexpired 2-year term): Ron Doughty, Prudential
- · Treasurer: Kandice Sanaie, UnitedHealth

#### **Bylaws Updates**

The Board has worked this past year to update the Bylaws of the Association. These changes include:

- · Clarifying membership criteria
- Expanding options for voting
- Updates to the Board schedule and vacancy procedures
- Modernized verbiage re: indemnification

Visit the registration desk to vote via one of our tablets, or access the voting link on the TALHI mobile app in the TALHI Home Page section under "Links."

# GET CONNECTED WITH THE TALHI MOBILE APP

- ▶ Full member directory
- ▶ Key regulatory staff contacts
- ▶ Full bios for event speakers
- Speaker presentations
- Event info
- Website access

Search for "TALHI" in your APPLE APP STORE or GOOGLE PLAY STORE.



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A special thanks to these organizations who continue to support TALHI and our issues of mutual interest.











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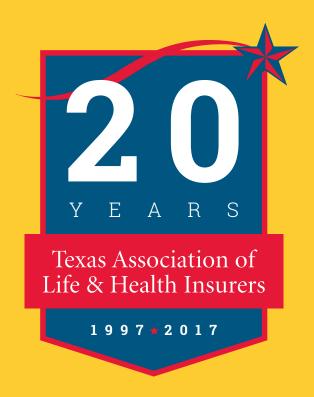
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