EXECUTIVE SUMMIT
April 3–5, 2017
W Chicago | City Center
Chicago, IL

2017 Executive Summit - Schedule of Events

An exclusive, invitation only event for fraternal CEO members of the American Fraternal Alliance

Monday, April 3

4:00 p.m. - *Meeting Registration*

Visit the Alliance registration desk to check in and pick up your badge and meeting materials.

6:00 p.m. – *Welcome Reception*

Don't miss this popular first event of the Summit. Join your CEO peers at the Welcome Reception, where the conversation and networking start right away.

7:00 p.m. – Dinner on Own

Tuesday, April 4

7:30 a.m. – *Networking Breakfast; Chat with Alliance board members and leadership team, sponsors, and your peers*

8:30 – 8:45 a.m. – *Welcoming Remarks*

Remarks from Craig Van Dyke, President, Western Fraternal Life and Chair of the Executive Summit Advisory Council

8:45 – 9:00 a.m. – *State of the Alliance Report*

Report from Bill O'Toole, President and CEO, Catholic Financial Life and Chair of the Board of the American Fraternal Alliance

9:00 – 10:15 a.m. – ***Trump and the New World Order: Implications for the Economy***

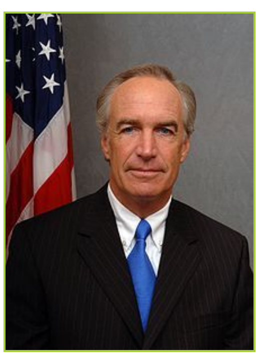
Diane Swonk, DS Economics

Session Description: The surprise victory of Donald J Trump has ushered in surge in both optimism and uncertainty. Will Republicans unify to deliver on pro-growth policies, or will fissures in the Party extend the era of gridlock in Washington? Is President Trump a pragmatist or a populist at heart? Are we really on the verge of a trade war with China and Mexico? Will the rise in populism abroad tip the scales on globalization? Diane Swonk will discuss those issues and their implications for the US economy and the Federal Reserve in 2017 and beyond.

Diane Swonk delivers an exceptional presentation, with immense expertise and plenty of time for questions from the audience. Be ready with yours.

10:15 – 10:45 a.m. – *Networking Break; Chat with Alliance board members and leadership team, sponsors, and your peers*

10:45 – 11:45 a.m. – ***Securing Our Nation's Financial Future: The Important Role Life Insurers Must Play on Main Street and Capitol Hill***



Governor Dirk Kempthorne, President and CEO, American Council of Life Insurers

Speaker Bio: Dirk Kempthorne was appointed president and CEO of the American Council of Life Insurers (ACLI) in November 2010 after an impressive career in public service.

As president and CEO of ACLI, Governor Kempthorne is the chief representative and spokesman for the life insurance industry before Congress, the administration, in all state capitals, and in the international arena. ACLI's approximately 300 member companies account for over 90 percent of the assets and premiums of the U.S life insurance and annuity industry.

Governor Kempthorne's focus is on the important role life insurers play in providing financial and retirement security to many millions of American families. His efforts help shape public policies that make it easier for families to manage risk and ensure they have

	protection, long-term savings, and guaranteed income-for-life options in retirement.

11:45 a.m. – Noon – ***Update on United Fraternal Services***

Noon - 1:15 p.m. – *Networking Lunch; Chat with Alliance board members and leadership team, sponsors, and your peers*

1:15 – 2:30 p.m. – ***The Shifting Regulatory Environment***

	Edward L. Toy, Director, NAIC Capital Markets Bureau Session Description: The financial crisis of 2008 highlighted the importance of tracking investment markets from a macro-prudential standpoint. Extreme levels of volatility exposed risks in even conservatively managed portfolios. Volatility is continuing – with commodity prices, currency exchange rates and capital flows. This requires both insurance company investment professionals and insurance regulators to think differently, and to engage more. Insurers need to understand more where regulators concerns may lie and how to resolve those concerns. Insurance regulators need to be focused more on what the real risks to solvency are.

2:30 – 3:00 p.m. – *Networking Break; Chat with Alliance board members and leadership team, sponsors, and your peers*

3:00 – 4:30 p.m. – ***CEO Roundtables***

This session offers the opportunity for fraternal CEOs to have frank and open discussions about current challenges and opportunities facing the fraternal sector. Moderated by members of the 2017 Executive Summit Advisory Council, this session will foster an environment for idea exchange at the strategic level.

More details about roundtable topics coming soon.

6:00 p.m. – ***Reception***

7:00 p.m. – Dinner on Own

Wednesday, April 5

7:30 a.m. - 8:30 a.m. – *Networking Breakfast; Chat with Alliance board members and leadership team, sponsors, and your peers*

8:30 – 9:00 a.m. – ***American Fraternal Alliance Branding Update***

Maria Ferrante-Schepis, Executive VP and Managing Principal Insurance & Financial Services Innovation, Maddock Douglas

9:00 – 9:30 a.m. – ***Alliance Advocacy Update***

9:30 – 10:00 a.m. – ***Update and Expert Commentary on the Future of the DOL Fiduciary Rule***

Bradford P. Campbell, Partner, DrinkerBiddle

Speaker Bio: Bradford P. Campbell is a nationally recognized figure in employer-sponsored retirement plans. He is the former Assistant Secretary of Labor for Employee Benefits and former head of the Employee Benefits Security Administration. As ERISA's former "top cop" and primary federal regulator, Brad provides his clients with insight and knowledge across a broad range of ERISA-plan related issues. He provides employee benefits advice to financial service providers and plan sponsors, particularly in relation to ERISA Title I issues, including fiduciary conduct and prohibited transactions. A prominent voice in the debate over the Department of Labor fiduciary regulation, Brad testified before three Congressional committees regarding the effects of the regulation, and provides clients with strategic and legal advice related to the final rule.

10:00 – 10:30 a.m. – *Networking Break; Chat with Alliance board members and leadership team, sponsors, and your peers*

10:30 – 11:45 a.m. – ***Transforming for Growth***

Mark Higgins, Senior Managing Director, FTI Consulting

Session Description: With low rates of life insurance ownership and complex annuity options still a mystery for many prospects, experimentation and innovation is called for in terms of insurers engineering products that are more consumer friendly, improving methods of attracting and engaging clients through traditional as well as new channels, as well as more effectively communicating the value proposition they offer. Enhanced understanding of the needs, wants, behaviours and attitudes of customers is an underpinning capability requirement in this regard. This in turn is underpinned by a unified customer view, aggregated from enterprise data.

11:45 a.m. – *Closing Comments*

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