

BLUE WATER SAILING

Navigating the Waves of Life!



13TH ANNUAL CONFERENCE / SEPTEMBER 25-27, 2016 / NEWPORT BEACH, CA

Join LIDMA this year in beautiful Newport Beach, CA. Connect one-on-one with industry peers, network, form new partnerships, learn from industry experts and grow our business at the 13th Annual LIDMA Conference. The conference will focus on:

- The state of the channel
- Marketing strategies
- Carrier and vendor innovation
- Action items to improve business now
- Process improvement
- Industry legal & regulatory updates
- Technology



LIDMA

LIFE INSURANCE DIRECT MARKETING ASSOCIATION

Join us to explore which hot topics will help you anchor your approach and navigate your business to success at LIDMA 2016!

About LIDMA

The Life Insurance Direct Marketing Association is the primary organization dedicated to supporting businesses and professionals active in direct sales of life insurance products to consumers - the fastest growing sales segment in the life insurance industry.

Our Purpose

“Together, Everyone Achieves More!” We’ve all heard this saying before and it is the very best articulation of the purpose of LIDMA. The ultimate objective is to serve people better, to enhance the buying experience and efficiently get more life insurance protection in force for the families and businesses that need it. Together, in this case, includes direct response life insurance producers, carriers that get the business, technology solution providers who help us along the way and the good medical service companies we all work with. While we are developing and changing how consumers buy life insurance, we have an opportunity, and some might say a responsibility, to enhance the value of our companies by strengthening the segment in which we operate.

Our Mission

LIDMA was created to fuel the growth of the direct response sales segment of the life insurance industry. Our mission is to be an innovative resource provider: Helping our members grow and improve business performance.

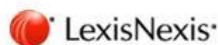
Our Objectives

- Operate for the benefit of all members including producers, carriers, exam companies and other vital business partners
- Provide an open forum to facilitate networking and collaboration within the industry
- Improve the process
- Identify and gather market research data that is applicable to our niche
- Improve Legal and Regulatory compliance and influence

2016 Premier Sponsors



2016 Signature Sponsors



2016 Showcase Sponsor



2016 Cornerstone Sponsors



2016 LIDMA *Fall Meeting*

The Life Insurance Direct Marketing Association (LIDMA) has announced that its Annual Fall Meeting & Business Showcase will take place September 25 through September 27, 2016 at the Balboa Bay Resort in Newport Beach, CA. LIDMA is the life insurance industry's most focused gathering of high performance direct response marketers, producers, underwriters and vendors who are driving positive changes in the distribution of life insurance in order to benefit middle market consumers.



"Because the direct response channel in life insurance is exciting, innovating and growing, we've adopted the theme Blue Water Sailing to honor the enormous opportunities that lie ahead" remarked LIDMA president Byron Udell. "The movers and shakers of this sector will all be at The Balboa Bay Resort on September 25 and you should, too."

Underwriters, producers and vendors who are interested in the direct marketing of life insurance are invited to attend.

"Headlining our list of industry experts is Keynote Speaker Robin Raina, Chairman, President and CEO of fast-growing insurance technology powerhouse, EBIX. Robin's perspective will delight our members as he describes how he built an international insurance tech business valued at \$1.6 billion and came to provide software services that power more than 300,000 insurance agencies," Udell continued. "Robin's talk will also provide interesting insights into how EBIX is taking a leadership position in the industry to penetrate the mid-market through a variety of distribution channels including direct-to-consumer."

Attendance at the LIDMA Balboa Bay Resort Fall Meeting & Showcase is available only to LIDMA members. Udell continued, "We've made it especially attractive for life insurers, banks and financial institutions who are eyeing this space to attend, offering discounted annual membership fees for first-time producers at the low cost of \$495, which includes a 50% discount." Information on the various membership categories and pricing is available at www.lidma.org.

More and more life insurance buyers are becoming self-directed and using direct response channels as their preferred method of purchasing life insurance. Recent trends in the direct-to-consumer sector have recently seen accelerated interest from big box stores, electronic retailers, search engine companies, banks, credit unions and other non-traditional companies that command vast audiences. LIDMA is the primary organization dedicated to supporting business and professionals who are active in this new and rapidly expanding channel.

The agenda for this year's event includes industry panel discussions, a detailed "State of the Industry" address, updates on the evolution of the LIDMA e-Process and Process Improvement success stories. Presentations include:

- *Navigating the Waves of Life and Beyond*, Robin Raina, Chairman and CEO, EBIX
- *The Real Life Story* of Jason Sherman
- *Behavioral Economics: Improving the Way We Do Insurance*, Yommy Chiu, Head of Life and Health R&D, Swiss Re
- *Managing the Customer Experience*, Todd Silverhart, Corporate Vice President and Director of Insurance Research, LIMRA
- *Who is MIB and What Does It Mean to Me?* Lee Oliphant, President, MIB Group, Inc.

"LIDMA is leading the charge for new technologies and processes that are so important when the customer is not face-to-face," says Udell. "This Fall's Annual Conference is shaping up as our largest-ever, so plan to attend and learn."

RELEVANT *Industry Speakers*

Real Life Story – Jason Sherman

Jason and Nicole Sherman had a lot on their plate. As parents of a 2-year-old and with another on the way, this couple—in their early 20s—were also juggling the demands of school, Jason’s sales job and running Nicole’s in-home daycare. They understood how important it was for Jason, the primary breadwinner, to get more life insurance. But Nicole was adamant about getting a policy for herself, too. She wanted to make sure that Jason and the girls would be OK if something happened to her. While money was tight, Nicole said, “We’re going to do this and make it work.” So she incorporated it as just another item in their monthly budget.



Yommy Chiu - Head Life & Health R&D Underwriting - Swiss Re, Swiss Management (US) Corporation

Yommy Chiu joined Swiss Re as a Research Specialist in 2013 with an initial focus on modelling pandemic influenzas and infectious diseases. She is currently the Head of Life & Health R&D Americas. Since joining Swiss Re, Yommy has been involved not only with the modeling of pandemics, but also changes in the landscape of cardiovascular and metabolic diseases in high growth markets such as Brazil and China, better understanding of trends in population health and mortality, and the impact of technology and medical advances. In 2015 she joined Swiss Re's Behavioral Research Unit bringing insights from behavioral economics into the world of insurance in order to better understand and predict customer behavior. Through the means of live field tests with clients around the globe, she is helping to improve outcomes in the fields of underwriting, sales, retention and claims. Recently, Yommy finished up a 6-month secondment to Hong Kong as the Head of Life & Health R&D Asia where one of her area of focus is helping to further grow the behavioral testing in the Asian markets.



Todd A. Silverhart, Ph.D., Corporate Vice President and Director, Insurance Research - LIMRA

Silverhart is responsible for directing LIMRA’s insurance research program, which takes a holistic view of product, market, and consumer issues related to individual and group life, health, disability, and long-term care insurance. He oversees ongoing benchmarking surveys on sales, persistency, and product design, as well as product-focused marketing and company practices studies. In addition, Silverhart manages research addressing a variety of issues inherent in marketing insurance products to consumers (with a particular focus on the middle market, the affluent market, business markets, and emerging consumer markets). Having joined LIMRA in 1988, Silverhart previously served in LIMRA’s Assessment Solutions unit, where he conducted producer and field manager selection research, consultation, and product development. From 2000 to 2012 he developed and managed LIMRA’s technology in marketing and distribution research program. Silverhart is a graduate of Middlebury College and received his Ph.D. in industrial and organizational psychology from Old Dominion University.



John F. Costello, Jr. – Partner - Dinsmore & Shohl

John is a partner in the Corporate Department of Dinsmore & Shohl, where he focuses his practice on federal and state regulatory compliance. His practice includes advising and counseling businesses and individuals to navigate the complexities of regulatory oversight, including compliance, impacting legislative action, resolving litigation, and handling government investigations and enforcement actions. Clients in a variety of industries rely on John’s vast experience with regulatory issues as he counsels them on the development and documentation of service and product offerings, as well as the creation and implementation of compliance management programs. In particular, his areas of focus include consumer financial products and services, data privacy and identity management, and assisting clients to ensure their direct marketing operations are compliant.



Robin Raina - Chairman of the Board, President and Chief Executive Officer - Ebix, Inc

Robin Raina was elected as a director of the company in February 2000. Robin joined Ebix in October 1997 as Vice President - Professional Services and was promoted to Senior Vice President - Sales and Marketing in February 1998. He was promoted to Executive Vice President and Chief Operating Officer in December 1998, then President effective August 2, 1999 and Chief Executive Officer effective September 23, 1999. Robin was named Chairman of the Board effective May 31, 2002. Robin has been in the IT sector since 1990 when he started his professional career after finishing a five-year Bachelor's Engineering program in Industrial Engineering from Thapar University in India. Robin had the distinction of receiving the coveted "University Color" for his organization skills from Thapar University.



2016 LIDMA Conference Agenda

Sunday, 9/25

<u>Time</u>	<u>Session</u>	<u>Location</u>
	LIDMA Arrivals	
1:00 p.m.	LIDMA Leadership Meeting	Governor's Boardroom
3:00 p.m.	Registration Opens	Grand Ballroom Pre-function
3:00 – 5:00 p.m.	Business Showcase Set-up	Grand Ballroom Pre-function
5:00 p.m.	LIDMA Newcomer Reception with Board of Directors Is this your first LIDMA Annual Conference? If so, we invite you to join us and connect with other first time attendees as well as the LIDMA Executive Committee, Board of Directors and Committee Chairs. We're here to help you navigate to get the most out of LIDMA!!	Grand Ballroom Pre-function
5:30 – 6:30 p.m.	Welcome Networking Reception Reunite with old friends and make new connections with a quick drink and light refreshments.	Grand Ballroom Pre-function
6:30 p.m.	Dinner on your own	

Monday, 9/26

<u>Time</u>	<u>Session</u>	<u>Location</u>
7:30 a.m.	Registration Continued	Grand Ballroom Pre-function
7:30 – 8:00 a.m.	Continental Breakfast	Grand Ballroom Pre-function
8:00 – 8:30 a.m.	Hosted Session – Paperless Solutions Group	Grand Ballroom C
8:35 – 9:05 a.m.	Hosted Session – EMSI	Grand Ballroom C
9:10 – 9:40 a.m.	Hosted Session – EPeNoah	Grand Ballroom C
9:45 – 10:15 a.m.	Hosted Session – AIG	Grand Ballroom C
10:20 – 10:50 a.m.	Hosted Session – ExamOne	Grand Ballroom C
10:55 – 11:25 a.m.	Hosted Session – Surance Bay	Grand Ballroom C
11:30 – 12:00 p.m.	Hosted Session -- Legal & General	Grand Ballroom C
12:15 – 1:00 p.m.	Networking Lunch	Coconut Grove
1:00 – 1:30 p.m.	Conference Opening Session LIDMA President, Byron Udell, JD, CLU, CFP, ChFC	Grand Ballroom A/B
1:30 – 2:00 p.m.	Real LIFE Story: You Need to be Prepared Jason Sherman	
2:00 – 2:45 p.m.	Behavioral Economics: Improving The Way We Do Insurance Yommy Chiu, Head Life & Health R&D Americas, Swiss Re	
2:45 – 3:15 p.m.	Exhibit Hall Connect – Visit exhibitors in the hall for your chance to win!	
3:15 – 4:00 p.m.	Customer Experience Management Todd Silverhart, Corporate Vice President and Director, Insurance Research, LIMRA	
4:00 – 4:45 p.m.	Underwriting: Today and Tomorrow - Chief Underwriter panel Moderator: John Reynolds, Vice President Strategic Solutions, ExamOne	

4:45 – 4:55 p.m.	LIDMA Vision Award	
4:55 – 5:00 p.m.	Closing Remarks: LIDMA President, Byron Udell, JD, CLU, CFP, ChFC	
6:30 – 7:00 p.m.	President’s Reception	Members Lawn & Beach
7:00 – 10:00 p.m.	An Evening with LIDMA Join all of your peers for a terrific networking evening that is sure to create great memories! Featuring live entertainment, dinner and ample time to visit with your customer base and create new relationships.	Members Lawn & Beach

Tuesday, 9/27

<u>Time</u>	<u>Session</u>	<u>Location</u>
8:15 – 9:00 a.m.	Breakfast Buffet	Grand Ballroom C
9:00 – 9:15 a.m.	Welcome Back LIDMA President, Byron Udell, JD, CLU, CFP, ChFC	Grand Ballroom A/B
9:15 – 9:45 a.m.	Legal & Regulatory Update John F. Costello, Jr., Partner, Dinsmore & Shohl, LLP	
9:45 – 10:00 a.m.	LIDMA Life Lessons Scholarship	
10:00 – 10:45 a.m.	State of the Channel – Moderator: Frank Gencarelli; Debate Team: Chuck Anderson, FLMI, Senior Vice President, Prudential Select Brokerage, Prudential Insurance; Jan Pinney, CLU, ChFC, CPCU, CEO, Pinney Insurance Center	
10:45 – 11:00 a.m.	Break with Exhibitors	Grand Ballroom Pre-function
11:00 – 11:40 a.m.	Process Improvement Initiatives & Implementation Strategies – Straight Through Processing with Voice Signature Moderator: Keli Seder, Brokerage Life Sales Director, Mutual of Omaha	Grand Ballroom A/B
11:40 – 12:20 p.m.	Process Improvement Initiatives & Implementation Strategies - Mobile Strategies Moderator: Jason Janofsky, Senior App Development Manager, ExamOne	
12:20 – 1:00 p.m.	Sponsored Luncheon	Coconut Grove
1:00 – 1:40 p.m.	Process Improvement Initiatives & Implementation Strategies – Upsell Moderator: Jennifer Youngs, Director of Sales and Administration, Insurance Central	Grand Ballroom A/B
1:40 - 2:20 p.m.	Post Sale Strategies to Grow Your Business Moderator: Jennifer Youngs, Director of Sales and Administration, Insurance Central	
2:20 – 3:00 p.m.	Who is MIB & What Does it Mean to Me? Lee Oliphant, President and Chief Executive Officer, MIB Group, Inc.	
3:00 – 3:30 p.m.	Break with Exhibitors	Grand Ballroom Pre-function
3:30 – 4:30 p.m.	Navigating the Waves of Life and Beyond Robin Raina, Chairman and CEO, Ebix, Inc.	Grand Ballroom A/B
4:30 – 4:45 p.m.	Closing Remarks: LIDMA President, Byron Udell, JD, CLU, CFP, ChFC; LIDMA President Elect, Shervin Eftekhari, President, Zander Insurance Group	
5:00 – 7:00 p.m.	Innovation Exchange: Expanding Your Horizons At the end of an agenda packed with specific strategies to set your sail for the next level of success, take advantage of this opportunity to collaborate & elevate your business while you enjoy an evening networking with your peers in a casual dinner setting.	Bay View Room / Bar / Patio

LIDMA *Sponsorship*

We value our partners and want to provide creative opportunities to get in front of new prospective customers. These are limited sponsorship opportunities and sell very quickly. Our sponsorship package opportunities are available on a first come first serve basis.

Premier Sponsorship Package - \$5,500 – (SOLD OUT)

Premier sponsorship allows you to personally invite your attendees for a private session and have control of who your audience is.

- Exclusive 30 Minute Private Session! One on one time with the attendees you choose.
- Signage in main conference hall
- Special recognition and mention throughout the conference
- Business Showcase display table throughout conference (optional)
- Company logo on Mobile Conference App and LIDMA Website
- Advance Copy of Attendee List
- 3 Attendees + CEO for Free

Executive Sponsorship Package - \$4,000

Executive sponsorship affords expanded presence and exposure before and during the conference.

- Signage in main conference hall
- Special recognition and mention throughout the conference
- Business Showcase display table throughout conference (optional)
- Company logo on Mobile Conference App and LIDMA Website
- Advance Copy of Attendee List
- 3 Attendees

Signature Sponsorship Package - \$2,500

With Signature sponsorship, you have the opportunity to enhance your visibility throughout the conference.

- Signage in main conference hall
- Special recognition and mention throughout the conference
- Business Showcase display table throughout conference (optional)
- Company logo on Mobile Conference App and LIDMA Website
- 2 Attendees

Showcase Sponsorship Package – \$1,750

Showcase your products and services to Direct Marketers and Carriers.

- Business Showcase display table throughout conference
- 1 Attendee

Cornerstone Sponsorship Opportunities:

- **Name Badge Lanyard Sponsorship: ~~\$1,500~~ - SOLD**
This is a great opportunity to promote your company's brand. Lanyards are given to all attendees at check-in. Investment includes lanyard production with your logo of choice (1 color).
- **Hotel Key Card Sponsorship: \$1,500**
From check-in to check-out attendees will see your branding or product message every time they use their room key. Your investment includes 4-color production of your logo / message on one side of the card, distributed to all LIDMA hotel guests.
- **Internet Access Sponsorship: ~~\$1,500~~ - SOLD**
Who's got you back on better service than basic hotel internet speed? Your company can! Recognition throughout conference for enhanced access.
- **Conference Mobile App Sponsorship: ~~\$2,000~~ - SOLD**
Mobile go to for all attendees to access schedule and presentation info with your company logo displayed.
- **Real LIFE Stories Presenter Sponsorship: ~~\$2,500~~ - SOLD**

Support a great message for everyone on why we do what we do! Costs cover honorarium, travel and lodging for the Real LIFE story presenter, recognition for your company as their sponsor and you get to introduce them.

- **Sunday Welcome Reception Sponsorship: \$1,500**
Network and promote your company. Sponsor will be recognized during the program, on signage and have napkins with their logo provided.
- **Monday Breakfast Sponsorship: \$1,500**
Sponsor will be recognized during the program, on signage and have napkins with their logo provided.
- **Tuesday Breakfast Sponsorship: \$1,500**
Sponsor will be recognized during the program, on signage and have napkins with their logo provided.
- **Monday Luncheon Sponsorship: \$2,000**
Sponsor will be recognized during the program, on signage and have napkins with their logo provided.
- **Tuesday Luncheon Sponsorship: \$2,000**
Sponsor will be recognized during the program, on signage and have napkins with their logo provided.
- **Tuesday Dessert & Coffee Break Sponsorship: \$1,250**
Sponsor will be recognized during the program and on signage and have napkins with their logo provided.

improve innovate integrate implement inspire

Why Should YOU Join LIDMA?

Increase your placement ratio

- LIDMA's customer centric approach a better, easier and faster customer experience
- Members are continually working on and sharing marketing pieces designed to reduce buyer's remorse and increase the sense of urgency
- Gain valuable Market Research to help make business decisions
- Walk away with ideas that you implement to make money immediately

Increase your operational efficiency

- LIDMA's Process Improvement Committee has made significant progress with their three initiatives: e-Signature, Voice Signature and Straight Through Processing
- Meeting every three weeks, the members from all 3 panels have demonstrated keen insight, unique perspective and a commitment to produce tangible results

Gain legal and compliance protection

- Are you up to date on the changing legal and compliance issues in our industry that may affect your business' bottom line directly?
- Do you want to reduce your exposure to unexpected legal costs due to not abiding properly to the laws and regulations?
- Leverage the strength of LIDMA and its member partners to gain valuable information and best practices to keep your efforts focused on running your business

Fully vetted set of industry expert vendor partners

- LIDMA's Seal of Approval Process connects members with fully vetted and endorsed vendors from each major area of the business

Network with Industry Leaders

- Best Practices don't need to be learned and developed by trial and error
- What is one good idea, one good relationship or one new streamlining process worth to your business?
- Build relationships and contact lists from top producing peers, carriers specific to the Direct Market space, and Partner Vendors
- Annual LIDMA Conference packed with great speakers and the opportunity for networking, business development and in-depth discussion of industry trends and future roadmaps

Hotel Reservations



All conference activities will take place at the **Balboa Bay Resort**, 1221 West Coast Highway, Newport Beach, CA 92663.

Make your reservations at the Balboa Bay Resort today! Visit www.lidma.org for online reservations. **Group rates are available starting at \$235 through August 24, 2016.** You may also call the hotel directly at (949) 645-5000 and mention the LIDMA Annual Meeting to make your reservation over the phone and to lock in your discounted rate.

PLEASE NOTE: LIDMA is not responsible for making your travel or hotel arrangements. Submitting a registration form for LIDMA's Annual Conference **DOES NOT** reserve a hotel room.

Nearby Airports

- John Wayne Airport: 7 miles / 10 minutes
- Los Angeles International Airport: 50 miles / 1hour
- San Diego International Airport: 87 miles / 90 minutes
- Long Beach Airport: 14 miles / 30 minutes



LIDMA HEADQUARTERS
Phone: 770-516-0207 866-890-LEAD (5323)

Email: info@lidma.org

LIDMA Makes LIFE Easier!