



Simsbury, CT

Meeting One Hundred and Eleven

The Life & Health Compliance Association is inviting all Insurance Compliance Professionals to our next meeting in Simsbury, Connecticut on October 22 - 24, 2018.

This meeting will be hosted by Michael L. Granger, PA.

We have made arrangements with the Simsbury Inn as the venue for another “information packed” meeting.

Tucked into the hills of Connecticut’s idyllic Farmington River Valley, The Simsbury Inn elegantly blends the casual comforts of country hospitality with the refinements of a modern hotel. Discover the quintessential New England inn, with colonial architecture and sprawling lawns framing views of Talcott Mountain.

The Simsbury Inn offers complimentary shuttle service to and from Bradley International Airport. Note that shuttle arrangements must be made in advance with the hotel.

We have reserved a block of rooms at a special rate of \$131.00 per night (plus applicable taxes). Note that the room rate includes Wi-Fi and complimentary continental breakfast in the hotel lobby from 6:30 to 10:00 AM each morning. Check out the hotel website at: <http://www.simsburyinn.com>

Hotel reservations can be made by calling the hotel directly at 860-651-5700. You will need to reference “Life & Health Compliance Association” when making your reservation by telephone. If you only plan to stay the two meeting nights (check in 10/22 – check out 10/24), you can make your hotel reservations online at: <https://reservations.travelclick.com/5117?groupID=2276622&hotelID=5117#/guestsandrooms> Note that there are a limited number of rooms available at the special room rate. The special room rate will expire on the earlier of the date the room block sells out or October 8, 2018.

Early registration for the meeting is \$435.00. Registration fee checks must be postmarked (or paid online via credit card) on or before October 8, 2018. After October 8, the registration fee for the meeting is \$535.00.

Attendees are encouraged to bring guests. The guest registration fee is \$50.00 and includes lunch on Tuesday, the reception on Monday & Tuesday evenings and access to refreshments at all scheduled meeting breaks.

The Don Edde Memorial Golf Tournament will be held at a local golf course near the hotel (course details will be posted as soon as it is available). The tournament will be played on Monday morning, October 22, 2018. The fee for Golf is \$100.00 per player and includes greens fees and lunch.

Please note that we cannot make any registration fee refunds for cancellation requests received after October 10, 2018.

If you have any questions about the meeting, please contact:

Mike Granger
850-445-8041

or

Fred Alvarado
319-389-6151

Email: MGranger1@charter.net

email: alvaraf@att.net

See the latest meeting agenda draft on the next pages

Agenda at a Glance

| Time | Description | Location |
|-----------------------------------|---|------------------|
| Monday – October 22, 2018 | | |
| 7:00 am – 7:30 am | Golfers' Breakfast | |
| 1:00 pm – 6:00 pm | Exhibitors Set-Up | Lobby |
| 1:00 pm – 5:30 pm | General Registration | Lobby |
| 3:00 pm – 4:45 pm | Executive Committee Meeting | Penwood |
| 4:45 pm – 5:30 pm | New Attendees Workshop - Moderator: Fred Alvarado | Penwood |
| 5:30 pm – 7:30 pm | Welcome Reception – Hors d'oeuvres / Dinner on your own. | Evergreen Lounge |
| Tuesday – October 23, 2018 | | |
| 6:00 am – 8:00 am | Breakfast | |
| 7:30 am – 10:00 am | Late Registration | Lobby |
| 8:00 am – 8:15 am | General Session <ul style="list-style-type: none"> ▪ Welcome – Mike Granger ▪ Anti-Trust Statement – Marc Cavadel, Protective Life | Laurel A |
| 8:15 am – 8:30 am | Welcome to Connecticut – Commissioner Katherine L. Wade | |
| 8:30 am – 9:15 am | General Session <ul style="list-style-type: none"> • General Questions and Supplemental General Questions | |
| 9:15am – 10:15 am | Tracking System for Product Information/Approvals <ul style="list-style-type: none"> • Using Access – Beth Blackwell, CNO • Using Sharepoint – Andrea Davey, Athene | |
| 10:15 am – 10:35 am | Refreshment Break | |
| 10:35 am – 11:15 am | General Session – <ul style="list-style-type: none"> ▪ Life Questions – and Supplemental Life Question | |
| 11:15 am – 12: 00 noon | Hot Topics <ul style="list-style-type: none"> ▪ CT – Paul Lombardo, Director, Life and Health Division; Danny Albert, Principal Examiner, Life and Health Division ▪ NH - Michael Wilkey, Director, Filings (Tentative) | |
| 12:00 noon– 1:00 p.m. | Lunch | |
| 1:00 pm – 1:45 pm | What's Happening in CA <ul style="list-style-type: none"> • Randall Doctor, Doctor Law Group | Laurel A |
| 1:45 pm – 2:30 pm | NY – Non-Guaranteed Elements <ul style="list-style-type: none"> • Cailie Curran, Curran Compliance • Tom Hartman, Curran Compliance | |
| 2:30 pm – 3:15 pm | General Session – <ul style="list-style-type: none"> • Annuity Questions – and Supplemental Annuity Questions | |
| 3:15 pm – 3:35 pm | Break | |
| 3:35 pm - 4:15 pm | Genetic Information for Underwriting - ACLI | |
| 4:15 pm – 5:00 pm | IIPRC Presentation - Ed Charbonnier <ul style="list-style-type: none"> • IDI standards update • Gaps in Individual Life Uniform Standards • Other hot issues that impact the Compact and its filers. | |
| 5:30 pm – 7:30 pm | Reception - Networking Event - Hors d'oeuvres / Dinner on your own | Evergreen Lounge |

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| Time | Description | Location |
|-------------------------------------|--|----------|
| Wednesday – October 24, 2018 | | |
| 7:15 am – 8:15 am | Breakfast | |
| 7:15 am – 9:00 am | Executive Committee Breakfast Meeting | |
| 9:00 am – 9:15 am | <ul style="list-style-type: none"> ▪ Executive Committee Report ▪ Future Hosts Report ▪ Invitation to attend next meeting | Laurel A |
| 9:15 am – 10:15 am | Health Insurance – Heather Jerbi, AHIP <ul style="list-style-type: none"> ▪ Medicare Supplement 2020 ▪ ACA Update/Supplemental Health ▪ NAIC Minimum Standards for Health update ▪ A&H Questions and Supplemental A&H Questions | |
| 10:15 am – 10:35 am | Refreshment Break | |
| 10:35 am – 11:15 am | Regulatory Update for New England States <ul style="list-style-type: none"> • Camille Simpson, ACLI | |
| 11:15 am – 12:00 noon | General Session <ul style="list-style-type: none"> ▪ Advertising Questions ▪ Group Questions ▪ Supplemental Questions (all topics) | |

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