

Society of Actuaries

Meeting Sessions Sponsored by the Marketing & Distribution Section

2010 Annual Meeting

15 [Electronic Commerce in the Life Insurance Industry](#)

Maria N. Thomson, FSA, MAAA; John Lucas; David A. Moore, FSA, MAAA; Michael Palace, ASA, MAAA

38 [So You Want to Offer Combination Products...](#)

Jeffrey E. Johnson, ASA, MAAA; Jeffrey S. Drake, FSA, MAAA; Bruce Moon, CLU, ChFC

97 [The Future Effects of Emerging Changes on Life Insurance Products and Distribution](#)

Charles E. Ritzke, FSA, MAAA; Richard W. Hekeler, Ph.D.; Lucian Lombardi, ASA

132 [Serving the Middle Market](#)

Jeffrey E. Johnson, ASA, MAAA; Brian Grigg, CFP, CLU, ChFC, FLMI; Jeffrey Shaw, CLU, ChFC

2010 Life & Annuity Symposium

2 [Actuary of the Future, Management & Personal Development and Marketing & Distribution Section Joint Reception: Speed Networking](#)

Margaret Resce Milkint; Mary Kilkenny

33 [The Economics of Life Insurance Distribution/Emerging Trends](#)

James C. Harkensee, FSA, MAAA; Douglas John Bennett, FSA, MAAA

44 [Product Development Process – Part I: Market Focused Product Portfolios](#)

Jeffrey E. Johnson, ASA, MAAA; Michael L. Kaster, FSA, MAAA; Michael Goldberger; Walter H. Zultowski, Ph.D.

52 [Product Development Process – Part II: Implementing the Right Products](#)

Mitchell R. Katcher, FSA, MAAA; Donna Schlegel; Naomi J. Weinstein

62 [Product Development Process – Part III: Dealing with Challenging People and Situations](#)

Michael L. Kaster, FSA, MAAA; Liz Berney, Ph.D.

2010 Webcasts

Life Insurance Automated Underwriting Systems

David Moore, FSA, MAA; Maria Thomson, FSA, MAAA

Impact of Environmental Change on Products & Distribution

Michael Kaster, FSA, MAAA; Richard W. Hekeler, PhD; Lucian J. Lombardi, ASA

2009 Annual Meeting

12 Knowing your Customer: Understanding the Generational Issues Behind Your Customer Base
Jennifer L. Brady, FSA, MAAA; Marilyn Moats Kennedy

50 Trends and Successes in the Middle Market
Michael L. Kaster, FSA, MAAA; Ben DiSylvester; Carmen Effron; Todd A. Silverhart, PhD

104 Trends and Developments in Rapid Assessment and Delivery (RAD)
Maria N. Thomson, FSA, MAAA; Mike Batty, FSA, CERA; Susie Cour-Palais; Ted Hatcher

125 Exploring the Economics of Distribution Channels
Douglas John Bennett, FSA, MAAA; Kevin Dougherty; Ken Ehinger

2009 Life Spring Meeting

45 Rating Agencies—Reactions and Perceptions Due to the Worldwide Financial Crisis
Jesse M. Schwartz, FSA, MAAA; George W. Hansen, FSA, MAAA; Grace Osborne

2009 Webcasts

The Past, Present and Future of Credit Insurance and Debt Protection
Christopher Hause, FSA, MAAA; Keith E. Nelson, FSA, MAAA; William F. Burfeind

Market Update – Bank Insurance
Michael Kaster, FSA, MAAA; Michael D. White, Ph.D.; Carmen F. Effron

2008 Annual Meeting

39 Critical Illness Developments
Sheila Matheson; Sebastien Blondeau, FSA, MAAA; Steve Fretwell, CLU

94 Distribution Economics
Andy Ferris, FSA, MAAA; Richard K. Berry; Lucian Lombardi, ASA; Kevin J. Pledge, FSA, FIA

112 Credit Insurance and Debt Protection Products Hot Topics
Christopher H. Hause, FSA, MAAA

126 E-Signatures
Jay M. Jaffe, FSA, MAAA; Patrick Hatfield

2008 Life Spring Meeting

75 [Selling Annuities through IMOs](#)

Ghalid Bagus, FSA, FIA, MAAA; Christopher L. Conklin, FSA, MAAA; Yan Fridman, FSA, MAAA

105 [Online Insurance: Internet Marketing](#)

Juliet R. Sandrowicz, FSA, MAAA; Chad Hersh; Brian Schlessinger

2008 Webcasts

Worksite Marketing

Keith Dall, FSA, MAAA; Ron Neyer; Timothy M. McGill; Richard Schaefer, FSA, MAAA

Preneed Insurance Issues and Trends

Graham Cook; Jeff Johnson, ASA, MAAA; Keith Dall, FSA, MAAA; Matt Nemcek, ASA, MAAA

2007 Annual Meeting

39 [The Speed-to-Market Imperative—Implications for Product Development and Product Strategy](#)

Van Beach, FSA, Alice Kroll, FSA, Marianne C. Purushotham, FSA

93 [Product Filing Anxiety: Tips and Advice to Make Your Filings Less Painful](#)

Kathryn Ruth Gurnett, Steven E. Konnath, FSA, Beth O'Quin

124 [The Many Ways of Selling Insurance through Banks](#)

Keith A. Dall, FSA, Christopher H. Hause, FSA, Tim Neumann

2007 Life Spring Meeting

13 Advanced Sales: Why Buy Large Face Amount Policies?

Keith A. Dall

31 [Overview of Credit Insurance and Debt Cancellation Products](#)

Robert J. Butler, Christopher H. Hause, Harvey J. Waite

43 [Speed Underwriting: At Least 10 New Ideas in 90 Minutes](#)

Angela Bolduc, Richard Braun, Bill Frank, Michael Gaughan, Hank George, Geoffrey Hakel, David Holton, Jay M. Jaffe, Allen M. Klein, Gary Lee, Juliet R. Sandrowicz, Robert Stout, Ernest A. Testa, Richard Veed

67 [Worksite Market and Products](#)

Jeffrey D. Koll, Dominique Lebel, Mark Christopher Massey

2006 Annual Meeting

15 [How Virtual Can Your Firm Be? Distribution Channel Risks and Outsourcing](#)

Van Beach, Mike Kerrey, Mike O'Brien, Faith E. Trapp

45 [State-of-the-Art Distribution Channel Modeling—Modeling Incoming Call Volume in a Direct Response Environment](#)

Juliet Sandrowicz, Peter Varisco

92 [Indexed Products: Distribution and Suitability](#)

Robert P. Stone, Joan Boros, Jim Mumford

2006 Life Spring Meeting

5 [Marketing Critical Illness Products in the U.S.](#)

Rodney A. Hill, James T. Helton III, Sheila Matheson

46 [IT Investment – Actuaries as Stakeholders](#)

Van Beach, Lisa Fox, Steven E. Konnath

58 [Distribution Trends](#)

Robert P. Stone, Lucian Lombardi, Ted Quinn

2005 Annual Meeting

33 [Successful Product and Process Innovation: Winners of the Product and Process Innovative Marketing Award](#)

Christopher H. Hause, Anand Deo, Jon Hamilton, Walter S. Rugland

97 [Protecting a Niche Market](#)

Tom Bakos, Gerry Danielson, Richard C. Dutton

2005 Life Spring Meeting

4 [Current Trends in Distribution Channels: Where are the Banks Headed?](#)

Christopher H. Hause, James W. Mann, Shaun Norris

12 [Current Trends in Distribution Channels: New Underwriting for a New Millennium](#)

Juliet R. Sandrowicz, Vera F. Dolan, James McArdle, Ernest A. Testa

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<http://www.soa.org/professional-development/archive/audio-recordings.aspx>