

**Society of Actuaries**  
**Meeting Sessions & Webcasts**  
**Sponsored by the Marketing & Distribution Section**

[2012 Annual Meeting](#)

**23** Interstate Compact – A Tool for Improving Speed and Distributor Satisfaction?  
*Adam Merlin Vanevenhoven, FSA, MAAA; Alice M. Fontaine, FSA, FCA, FCIA, MAAA; Jeff Kulesus, FLMI; Barb Ritzke*

**113** Insurance Marketing Through Social Media  
*Jennifer L. Brady, FSA, MAAA; Stephen Johnson; Karen Monks*

**145** Penetrating the Elusive Middle Market  
*Jason Bowman, ACII; Jeffrey D. Koll, FSA, MAAA; Scott D. Sheefel, FSA, MAAA*

[2012 Life & Annuity Symposium](#)

**13 / 22** Life Market Trends: Protection (offered twice)  
*Catherine J. Bierschbach, FSA, MAAA; Stephanie Anne Grass, FSA, CERA, MAAA; Donna Christine Megregian, FSA, MAAA*

**23 / 33** Portfolio Strategies and Rationalization (offered twice)  
*Bennett D. Kleinberg, FSA, MAAA; Dominique Lebel, FSA, FCIA, MAAA; John P. O'Shaughnessy, FSA, MAAA; Scott Niel Shepherd, FSA, MAAA*

**24** Regulatory and Tax Update  
*Robert P. Stone, FSA, MAAA; Karen K. Rudolph, FSA, MAAA; Susan Seabrook, JD; Michael C. Ward, FSA, MAAA*

**28** Using an Artificial Society (a Complexity Science Tool) to Project Life Insurance Sales  
*Benjamin Steward Wadsley, FSA, MAAA; Ben H. Wolzenski, FSA, MAAA; Walter H. Zultowski, Ph.D.*

**34** Competing in the Accumulation Market Without Aggressive Guaranteed Living Benefits  
*Guillaume Briere-Giroux, FSA, MAAA; Amit Ayer, FSA, MAAA; Vikas Sharan, FSA, FIA, MAAA*

**52** Products and Marketing Techniques for the Developing Senior Market  
*Jeffrey E. Johnson, ASA, MAAA; Jeffrey Shaw, CLU, ChFC; Walter H. Zultowski, Ph.D.*

**53 / 72** Advanced Mortality Topics (offered twice)  
*Kimberly M. Steiner, FSA, MAAA; Timothy L. Rozar, FSA, CERA, MAAA; Lloyd M. Spencer, Jr., FSA, CERA, MAAA*

## 2012 Webcasts

July 26, 2012

Under Served Middle-Income Market: Is it a Demand or Supply Problem – or is it Both?

Aug. 29, 2012

Underwriting Resources: Critical Companions in Life Insurance Risk Selection

Nov. 15, 2012

Better Understanding the Middle Markets for Life Insurance – Young Families

Dec, 6, 2012

Final Expense: Soup to Nuts

## 2011 Annual Meeting

**90** Emerging Technologies and the Future of Insurance Distribution – Part 1

*Douglas J. Bennett, FSA, MAAA; Anand Deo; Kevin J. Pledge, FSA, FIA*

**104** Emerging Technologies and the Future of Insurance Distribution – Part 2

*Douglas J. Bennett, FSA, MAAA; Chris Doggett; Enrico Treglia*

**145** Perspectives on the Middle Market Distribution

*Jeffrey D. Koll, FSA, MAAA; Joseph Lapine, CPA; Mathew Matarrese; Todd A. Silverhart, Ph.D.*

## 2011 Life & Annuity Symposium

**30** Model Management: Is it Possible?

*Robert P. Stone, FSA, MAAA; Trevor C. Howes, FSA, FCIA, MAAA*

**31** Does Anyone Else Want to be Illustration Actuary this Year?

*Donna Christine Megregian, FSA, MAAA; Gayle L. Donato, FSA, MAAA*

**32** Automated Underwriting as Tool for Mid-Market Growth

*Maria N. Thomson, FSA, MAAA; Karen Monks; Mike Reeves*

**40 / 55** Simplified Issue/Guaranteed Issue Market Update (offered twice)

*Jennifer L. Brady, FSA, MAAA; Jean-Marc Fix, FSA, MAAA; James C. Harkensee, FSA, MAAA; Lloyd M. Spencer, Jr., FSA, MAAA*

## 2011 Webcasts

March 24, 2011

Critical Illness in the Current Context = Huge Opportunity (How Your Company Can Succeed Where It Counts – in the Marketplace)

Sept. 29, 2011  
Automation in Life Underwriting

Nov. 1, 2011  
Microinsurance: A Risk Management Solution for Food Security in Developing Countries

### 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

Nov. 2, 2010  
Life Insurance Automated Underwriting Systems

Nov. 17, 2010

Impact of Environmental Change on Products & Distribution

Archived SOA Professional Development Presentations:

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

SOA Webcast & Virtual Session Recordings (for purchase):

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

SOA Professional Development Meeting Session Audio Recordings (for purchase):

<http://www.soa.org/Professional-Development/Archive/audio-recordings.aspx>