

Society of Actuaries
Meeting Sessions & Webcasts
Sponsored by the Product Development Section

[2013 Life & Annuity Symposium](#)

12 / 26 The Street's and Rating Agencies' View of the Life Insurance Industry (offered twice)
Ernest Rafael Armijos, FSA; John Nadel, MBA; Howard L. Rosen, FSA, CERA, MAAA; Neil T. Strauss, ASA, CERA, MAAA

13 / 28 Life Protection Product Update (offered twice)
Jeremy Allen Bill, FSA, MAAA; Elizabeth H. MacGowan, FSA, MAAA; Robert P. Stone, FSA, MAAA

14 / 37 Variable Annuity Product Update (offered twice)
Casey Edward Malone, FSA, CERA, MAAA; Ji-Eun Choi, ASA, MAAA, Ph.D.; Karen Ann Grote, FSA, CERA, MAAA; Kendrick D. Lombardo, FSA, MAAA

27 Canadian Standards of Practice and Regulation Update
Rebecca M. L. Rycroft, FSA, FCIA, MAAA; Gaetano Geretto, FSA, CERA, FCIA; Jacques Tremblay, FSA, FCIA

29 Risks in Products
James M. Filmore, FSA, MAAA; Blake A. Hill, FSA, FCIA; Donna Christine Megregian, FSA, MAAA

36 Life Illustration Compliance
Susan K. Bartholf, FSA, MAAA; Gayle L. Donato, FSA, MAAA; Donna Christine Megregian, FSA, MAAA

38 Comparing Principle-Based Approaches: From Theory to Practice
G. Brent Chambers, FSA, FCIA; Benjamin Richard Neff, FSA; Rebecca M. L. Rycroft, FSA, FCIA, MAAA

54 / 90 Design Thinking: How Innovators Solve Problems (offered twice)
Chris A. Murumets; Lance H. Poole, FSA, MAAA; Stefanie Schram

55 / 87 Fixed Annuity Product Update (offered twice)
Andrew G. Steenman, ASA, MAAA; David J. Weinsier, FSA, MAAA

56 Uses of Reinsurance—Experiences in Canada and the United States
Vera Ljucovic, FSA, FCIA, MAAA; Robert B. Lau, FSA, FCIA; Michael David Mulcahy, FSA, MAAA; Brock E. Robbins, FSA, FCIA, MAAA

59 Impact of the Low Interest Rate Environment on Life Insurers
Richard C. Pretty, FSA, MAAA; Yidong (Winter) Liu, FSA, MAAA; Joseph R. Dziwura

64 U.S. Regulatory & Tax Update

Jonathan W. Porter, FSA, FCIA; John T. Adney, JD; Kimberly M. Steiner, FSA, MAAA

65 / 78 Life Product Update—Accumulation Market (offered twice)

Joseph Kordovi, FSA; David R. Beasley, FSA, CERA, MAAA; Robert Bhatia, FSA, FCIA; Wayne Tanning, FSA

66 Post Level Term Analysis

Jeremy Lee Lane, FSA, CERA, MAAA; Brett S. Bade, FSA, MAAA; Timothy L. Rozar, FSA, CERA, MAAA

76 Trends in Distribution

Andy Ferris, FSA, MAAA; Christian Erickson; Tom Wartenberg

77 LTC Combo Product Update

Carl A. Friedrich, FSA, MAAA; Dean Andrew Kerr, FSA, ACIA

86 Delphi Study in Real Time—Life & Annuity Products and Product Development

Alberto A. Abalo, FSA, CERA, MAAA; Paula M. Hodges, FSA, MAAA; Ben H Wolzenski, FSA, MAAA

88 Older Age Mortality

James M. Filmore, FSA, MAAA; Dieter S. Gaubatz, FSA, FCIA, MAAA; Timothy L. Rozar, FSA, CERA, MAAA

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June 6, 2013

Alternatives to Traditional Life Settlements: Maximizing Consumer Value in the Secondary Market

Aug. 28, 2013

The Senior Market

[2012 Annual Meeting](#)

26 Underwriting Trends

Allen M. Klein, FSA, MAAA; William Moore, FLMI

41 Experience Studies

Kevin J. Pledge, FSA, FIA; Steven C. Ekblad, FSA, MAAA; Derek Michael Kueker, FSA

42 UL Deep Dive Part I—Protection Market

Robert P. Stone, FSA, MAAA; Leston Radworth Welsh, FSA, MAAA

53 Assumption Setting Best Practices

Jason E. Kehrberg, FSA, MAAA; Lisa Hollenbeck Renetzky, FSA, MAAA; Kimberly M. Steiner, FSA, MAAA

54 UL Deep Dive Part II—Accumulation Market

Stephen R. Peeples, FSA, MAAA; David R. Beasley, FSA, CERA, MAAA; Timothy C. Pfeifer, FSA, MAAA

77 Mortality for Larger Face Amounts

Thomas P. Edwalds, FSA, ACAS, MAAA; Jean-Marc Fix, FSA, MAAA; Allen M. Klein, FSA, MAAA; Bradley T. Roudebush, FSA, MAAA

88 Life Product Development Trends and Issues

Craig E. Hanford, FSA, MAAA; Dean Andrew Kerr, FSA; Donna Christine Megregian, FSA, MAAA

89 Pricing Application of Economic Capital Tools

Lance R. Berthiaume, FSA, MAAA; Kathryn A. Hyland, FSA, CERA, CFA, FCIA, MAAA; James A. Wiseman, FSA, MAAA

102 In-force Product Management

Stephen R. Peeples, FSA, MAAA; Mitchell R. Katcher, FSA, MAAA; David J. Weinsier, FSA, MAAA

116 Canada and the United States—Learning from Each Other

Lisa Hollenbeck Renetzky, FSA, MAAA; Rebecca M. L. Rycroft, FSA, FCIA, MAAA; Michael S. Taht, FSA, FCIA, MAAA

135 Annuity Product Development Trends and Issues

Lance H. Poole, FSA, MAAA; David J. Weinsier, FSA, MAAA; Nathan Daniel Wilbanks, FSA, MAAA

148 Regulatory Update Impacting Product Development

Paula M. Hodges, FSA, MAAA; Mary J. Bahna-Nolan, FSA, CERA, MAAA; Thomas A. Doruska, FSA, MAAA

156 What Do Predictive Modeling, Preferred Structures and Mortality Improvement Have in Common?

David N. Wylde, FSA, MAAA; Nadeem Chowdhury, FSA, MAAA; Rodney P. Cordle, FSA, MAAA; Gordon A. Gibbins, FSA, FCIA, BSc

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13 / 22 Life Market Trends: Protection (offered twice)

Catherine J. Bierschbach, FSA, MAAA; Stephanie Anne Grass, FSA, CERA, MAAA; Donna Christine Megregian, FSA, MAAA

14 / 32 Annuity Market Trends (offered twice)

Andy Ferris, FSA, MAAA; Timothy C. Pfeifer, FSA, MAAA; Tamiko Toland

15 Getting Your Annuity Policyholders to Behave

Robert P. Stone, FSA, MAAA; David L. Lautenschlager, FSA, MAAA; Ricardo Trachtman, 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

31 Life Insurance Illustration Regulation: 15 Years Later

Kurt A. Guske, FSA, MAAA; Gayle L. Donato, FSA, MAAA; Donna Christine Megregian, FSA, MAAA

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

43 Market Trends: Accumulation Products

Joseph A. Kenny, FSA, MAAA; David J. Weinsier, FSA, MAAA

44 / 63 Life Underwriting Trends (offered twice)

Lisa Hollenbeck Renetzky, FSA, MAAA; Allen M. Klein, FSA, MAAA; Scott Anthony Rushing, FSA, MAAA

46 / 54 Retirement Trends (offered twice)

Mitchell R. Katcher, FSA, MAAA; Tamara Burden, FSA, CFA, MAAA, PRN; Tina Wilson, CFA, AIF

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

55 Capital Management—Reserve Financing

Ronald L. Stopher, FSA, CPA, CLU, MAAA; Charles-Antoine Laplante, FSA, MAAA; Michelle Moloney, FSA, MAAA

64 / 71 Life and Annuity Product Development Strategies in the Wake of Low Interest Rates (offered twice)

Kurt A. Guske, FSA, MAAA; Timothy C. Pfeifer, FSA, MAAA; Robert P. Stone, FSA, MAAA; David J. Weinsier, FSA, MAAA

65 Reinsurance Issues

Joseph Lapine, CPA; Catherine J. Bierschbach, FSA, MAAA; Robert A. Diefenbacher, FSA, MAAA

72 Advanced Mortality Topics

Kimberly M. Steiner, FSA, MAAA; Timothy L. Rozar, FSA, CERA, MAAA; Lloyd M. Spencer, Jr., FSA, CERA, MAAA

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June 27, 2012

Life/Annuity Long-Term Care Combination Products

July 11, 2012

Premium Persistency of Flexible Premium UL Products

Nov. 20, 2012

Product Management and GAAP Valuation Strategies in a Low Interest Rate Environment

Dec. 12, 2012

What's Hot in Life Underwriting – A Primer for Life Actuaries

[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.

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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

Mar. 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

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