INSURANCE ACCOUNTING & SYSTEMS ASSOCIATION

2018 SPRING CONFERENCE

April 26 - 27, 2018
Midwest Chapter
2017-2018

PRESIDENT
Tim Flaherty
Johnson Lambert LLP
Park Ridge, IL
847-230-9759
tflaherty@johnsonlambert.com

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j.leitschuck@gwcnet.com

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jherting@bkd.com

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Your Experts In Payment Processing Solutions
Thursday, April 26, 2018

7:45 - 8:30  Breakfast Buffet / Registration / Visit with vendors

Paul Bredemeier, Scott Carson & Scott Woodward, Blue Ocean Consulting - Industrial Internet of Things (IIoT)  60

8:30 - 9:30  Brandy Vannoy, Johnson Lambert LLP - Tax Reform  60

9:30-10:30  Vendors Introduce themselves then break with vendors

11:00-12:20  Dale Reed, Pyramid Consulting Solutions - The Digital Prize - Insurance Re-Imagined  80

12:20-1:30  Lunch / Visit with vendors

1:30 - 3:30  Joel Krieger, Krieger Law Firm, LLC - Ethics  120

3:30-3:50  Break with Vendors

3:50-5:00  Emily Brawley, Clearwater - Data-Driven Portfolio Analysis: Key Metrics and Considerations  70

5:00 -  Thursday Night Event - Cocktail Hour then Kansas City Royals vs. Chicago White Sox (7:15 pm start)

Friday, April 27, 2018

7:15 - 8:00  Breakfast Buffet / Visit with vendors

Sarah House, Wells Fargo Securities, LLC - 2018 Economic Outlook: A Second Wind or Storm Brewing  60

8:00 - 9:00  Break with Vendors

9:00 - 9:20  Connie Woodroof - StoneRiver: NAIC Focus  100

9:20 - 11:00  Business Meeting

In accordance with the standards of National Registry of CPE Sponsors, CPE credits have been granted based on a 50-minute hour.
Midwest Chapter of IASA  
2018 Spring Conference, Blue Springs, MO  
Session Speakers - in order of Presentation

Paul Predemeier, Scott Carson & Scott Woodward – Blue Ocean Consulting, a division of MarksNelson  
Bio:  
In Scott Carson’s current role as President his duties include: provide leadership to position the company at the forefront of the industry; develop a strategic plan to advance the company’s mission and objectives and to promote revenue, profitability and growth as an organization and; oversee company operations to ensure production efficiency, quality, service and cost-effective management of resources. Scott, an accomplished senior management, sales, general management and operations professional, was most recently the Vice President of Kauffman FastTrac and responsibilities included general management to include day-to-day business operations, business development, sales and marketing. Prior to Kauffman, Scott enjoyed a 28-year career with Saint Louis, Mo. based Enterprise Holdings, Inc. and Enterprise Fleet Management, holding corporate officer positions including VP of fleet Management and VP of Corporate Training and Development.

Scott Woodward has more than 20 years of creating custom software solutions for business – from creative web sites to mission critical line-of-business applications. He collaborates with clients to understand the overall business goals, and evaluate the current state of business processes to identify solutions that help to generate revenue, create efficiencies, reduces costs and/or improve standards/regulatory compliance. Scott is accomplished in relationship management with the ability to communicate highly technical concepts to non-technical audiences. He earned both a Bachelors and a Master of Science degree in Electrical Engineering from the University of Kansas and is a certified ScrumMaster® from the Scrum Alliance.

Presentation Title and Summary:  
*Industrial Internet of Things (IIoT)*

Brandy Vannoy, Tax Partner - Johnson Lambert LLP  
Bio:  
Brandy Vannoy, CPA, is a Tax Partner with Johnson Lambert LLP, a multi-office, niche-focused firm that provides audit, tax, and advisory services to insurance entities as well as not-for-profit organizations and employee benefit plans. Brandy has 15+ years of experience in providing engagement management, tax compliance, and consulting services to the select industries that the firm serves. She consults on tax-related federal and state issues as well as other business opportunities that add value to her clients’ operations. Brandy is also experienced with IRS and state department exams. She has been with Johnson Lambert for over 10 years and began her career with KPMG, where she worked with both domestic and international clients’ tax return preparation and planning. She holds a Master of Accounting from North Carolina State University and a Bachelor’s degree from University of North Carolina at Chapel Hill.

Presentation Title and Summary:  
*Tax Reform*

The Tax Cuts and Jobs Act of 2017 was signed into law on December 22, 2017 bringing the biggest change to US tax law in over 30 years. This session will discuss the key impacts of this sweeping reform. We will cover the provisions in new tax law that impacts corporations and insurance companies specifically for 2018 tax year and beyond. Our session will include considerations that a company should be making internally to account for these law changes.
Dale Reed, Director, Business Development – Pyramid Consulting Solutions

Bio:
Dale Reed has over 25 years of experience in developing Technology Strategy and Solutions for the Insurance, Financial Services, Banking, CPG, Retail and Telecommunications industries. He received his MBA from the University of Chicago, Booth School of Business with a specialization in Finance and B.S. Accounting from DePaul University.

Dale also has a military background having served in the U.S. Army Military Police Corps. Dale has more interests than he says he has time available but he spends most of his free time with Martial Arts (1st degree Black Belt in Banzenkan Aiki Ninjutsu & Tae Kwon Do), competitive shooting (IDPA and 3 gun) motorcycling, cooking and scuba diving. Please feel free to chat him up on any or all of these topics.

Presentation Title and Summary:
The Digital Prize – Insurance Re-Imagined

Joel Krieger, Partner/Owner – Krieger Law Firm, LLC

Bio:

Presentation Title and Summary:
Ethics

Emily Brawley, Insurance Division Manager – Clearwater Analytics

Bio:
Emily helps Clearwater insurance clients improve the efficiency and accuracy of their investment and accounting operations and processes and ensures that they are optimizing their use of the Clearwater solution. Emily’s experience working closely with insurers gives her a unique view into their industry-related challenges, best practices, and trends. Prior to her role as the head of Clearwater’s insurance client servicing, Emily worked as both an account manager and team lead for a number of large and complex Clearwater insurance clients. She has extensive experience in asset types, multi-currency support with multiple exchange rate sources, upstream and downstream system integration, and complex accounting and close processes.

Emily is a volunteer on the national level for the Insurance Accounting & Systems Association (IASA) and serves as a member on the e-Learning committee and membership committee. Emily also serves as the Strategic Chair of the e-Learning Committee for the 2017/2018 IASA year. Emily has spoken at several regional IASA conferences, and she is frequently sought after because of her accounting and insurance expertise. Emily recently made the short list for the Waters’ Women in Technology and Data Awards 2018.

Emily is a certified public accountant and has a master’s in accountancy and a bachelor’s in accounting and finance from Gonzaga University.

Outside of work, you can find Emily waterskiing or wakeboarding on one of Idaho’s lakes or reservoirs. She is a die-hard bulldog and continues to cheer on the Zags!

Presentation Title and Summary:
Data-Driven Portfolio Analysis: Key Metrics and Considerations

With volatility in the global markets, analyzing the right portfolio metrics is more important than ever. Join Clearwater experts as they highlight key metrics for analyzing your investments and how those metrics can work together to paint a full picture of your portfolio to support performance strategies and other decision-making. This session will also help ensure that you and your managers are looking at the right metrics as you continue to refine your investment goals.
Sarah House, Economist – Wells Fargo Securities, LLC
Bio:
Sarah House is a vice president and economist with Wells Fargo Securities. Based in Charlotte, N.C., she covers the U.S. macro economy, including the labor market, manufacturing sector, and inflation trends. She regularly writes indicator reports, produces special commentary, and contributes to the company’s *Weekly Economic & Financial Commentary*. Sarah frequently speaks about the economy to the national media, including Bloomberg News and National Public Radio.

Prior to joining Wells Fargo in 2010, Sarah worked as a research associate for the Federal Reserve Bank of Richmond.

Sarah earned a B.A. in economics from Tulane University in New Orleans and a MSc in local economic development from the London School of Economics. She is a member of the National Association of Business Economics and the Charlotte Economics Club.

Presentation Title and Summary:
*2018 Economic Outlook: A Second Wind or Storm Brewing*

Connie Jasper Woodroof, FLMI, NAIC Liaison – StoneRiver
Bio:
Connie Jasper Woodroof began her career in the insurance industry in 1984 completing statutory filings for both Life and Property/Casualty companies. Ms. Woodroof spent nine years with the NAIC where she served in various capacities; reviewing of annual statements for quality, testing of RBC formulas and software during formula development, and assisting with the development and teaching of an industry educational series.

Since 2002, she has been the NAIC Liaison for StoneRiver, where she helps both StoneRiver and its clients keep abreast of events at the NAIC. Connie is active on several industry interested parties groups for NAIC issues, serving as a co-chair of the Blanks interested party group. Connie is a volunteer on the national level for the Insurance Accounting & Systems Association (IASA), currently serves as a member of the Accounting, Risk Management, and Finance (ARF) and eLearning committees, and contributes to the IASA accounting textbooks. Woodroof holds a B.S. in Accounting and a M.A. in General Psychology.

Presentation Title and Summary:
*NAIC Focus*
A new year is here bringing new accounting and reporting guidance. This session will prepare you for any reporting changes appearing in the quarterly statement, recent accounting changes, revisions being considered for the RBC formulas, and updates for other projects on the NAIC’s docket. Included will be actions taken at the recent NAIC Spring National Meeting.
Learning Objectives

Paul Bredemeier, Scott Carson & Scott Woodward – Blue Ocean Consulting, a division of MarksNelson

Industrial Internet of Things (IIoT):

1. Brief overview, historical perspective on the Industrial Internet of Things
2. The IIoT market 2025 Opportunity – Value to businesses (not just manufacturing)
3. A software company’s role in IIoT

Brandy Vannoy, Tax Partner – Johnson Lambert LLP

Tax Reform:

1. Gain a better understanding of new tax rules for insurance companies.
2. Understand what companies should be doing to track expenses due to changes in deductions for meals and entertainment.
3. Understand other considerations that should be made to best position the company given the new tax rules.

Dale Reed, Director, Business Development – Pyramid Consulting Solutions

The Digital Prize – Insurance Re-Imagined:

1. To gain an understanding of how the Insurance Industry was formed and why it has been so slow to transform as compared to other industries.
2. Understanding The Shift from a Product Culture to a Customer Centric Culture, what is driving the transformation and why it is so important for insurers.
3. Barriers to Improved Customer Engagement and Critical Components to consider for Customer Centric Innovation.

Joel Krieger – Krieger Law Firm, LLC

Ethics:

Emily Brawley, Insurance Division Manager – Clearwater Analytics

Data-Driven Portfolio Analysis: Key Metrics and Considerations:

1. Assess your portfolio returns against benchmark returns.
2. Understand how individual and group security returns and contributions relate to the overall return for a portfolio.
3. Use analytics values to project the future performance of securities
4. Understand what value at risk (VaR) represents for possible future variation in the market value of your portfolio.

Sarah House, Economist – Wells Fargo Securities, LLC

2018 Economic Outlook: A Second Wind or Storm Brewing:

1. Understand current state of economy.
2. Outlook for interest rates/federal reserve policy.

Connie Jasper Woodroof, FLMI, NAIC Liaison – StoneRiver

NAIC Update:

1. Prepare attendees for quarterly reporting.
2. Provide updates for pending NAIC projects.
3. Alert attendees to possible RBC revisions.
MINUTES OF THE MIDWEST CHAPTER OF IASA BUSINESS MEETING
2017 Fall CONFERENCE

The 2017 Fall Conference & Golf Outing of the Midwest Chapter of the Insurance Accounting and Systems Association (MWIASA) was held September 13th – 15th at the Adams Pointe Conference Center & Courtyard by Marriott in Blue Springs, Missouri.

Tim Flaherty called the business meeting to order on September 15th at 11:50 p.m.

Julie Leitschuck read the minutes of the Spring 2017 Conference. Rod Van Genderen moved and Scott McEntee seconded the approval of the minutes as read. Upon voice vote of the membership the motion was unanimously approved.

The Treasurer’s report was given by Ms. Leitschuck as follows:

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
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<tr>
<td>Balance Forward</td>
<td>$16,334.34</td>
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<tr>
<td>Revenue from Spring 2017 Conference</td>
<td>$15,528.00</td>
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<td>Expenses from Spring 2017 Conference</td>
<td>$17,255.14</td>
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<td>Balance June 2017</td>
<td>$14,607.20</td>
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Chris Frazier moved and Mr. Van Genderen seconded to approve the Treasurer’s report. Upon voice vote of the membership the motion was unanimously approved.

Mr. Flaherty announced the 2018 Spring meeting was being planned for the Adams Pointe Conference Center & Courtyard by Marriott in Blue Springs, Missouri on April 26th – 27th.

There being no further business, Mr. Flaherty asked for a motion to adjourn. Ms. Leitschuck moved and Julie Thelen seconded. Upon voice vote of the membership the motion was unanimously approved and the meeting was adjourned at 11:55 a.m.

_______________________________
|s| Julie Leitschuck, Secretary/Treasurer
### Spring 2018 Treasurer's Report Midwest Chapter IASA
### December 31, 2017

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<th>Description</th>
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<td>Beginning Bank Balance</td>
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<td>Angela Abbott</td>
<td>General Manager</td>
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<td>Susan Allen</td>
<td>Asst. Controller</td>
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<td>Kelly Anson</td>
<td>Sr Financial Accounting Analyst</td>
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<td>Edward Benks</td>
<td>Account Executive</td>
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<td>Nancy Bockelman</td>
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<tr>
<td>Emily Brawley</td>
<td>Insurance Division Manager - Client Services</td>
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<tr>
<td>Paul Bredemeier</td>
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<tr>
<td>Shannon Burns, CPA</td>
<td>Controller/Treasurer</td>
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<tr>
<td>Scott Carson</td>
<td>President</td>
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<tr>
<td>Carol Clark</td>
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<td>David Cohen</td>
<td>New Business Development</td>
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<td>Adam Collyer</td>
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<td>David Crawford</td>
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<td>Darcy Cruse</td>
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<td>Richard Deary</td>
<td>Head of Institutional Sales</td>
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<td>Neil Dennis</td>
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<td>Tarrah Dyal</td>
<td>CPA</td>
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<td>Molly Eastman</td>
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<td>Tim Flaherty</td>
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<td>Jason Wade Folken</td>
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<tr>
<td>Chris Frazier, CPA</td>
<td>SVP, CFO &amp; Treasurer</td>
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<tr>
<td>Gayle L. Gauert</td>
<td>Claims Payment Solutions Account Manager</td>
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<td>Darren Graves</td>
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<tr>
<td>Brett Hedberg</td>
<td>Accounting Services &amp; Business Advisory Manager</td>
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<td>Taylor Hellman</td>
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<td>Jacob Holman</td>
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<td>Sarah House</td>
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<td>Connie Jasper Woodroof, FLMI</td>
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<td>Lora Karaim, CPA</td>
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<td>David Kaseff</td>
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<td>Phoenix Keely Kaufmann</td>
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<tr>
<td>Leah McQueeney</td>
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<tr>
<td>Kevin Miller</td>
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<td>Dave Morales</td>
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<td>William Pierce</td>
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<td>Joe Pope, CPA</td>
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<tr>
<td>Steve Pruch</td>
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<tr>
<td>Dale Reed</td>
<td>Director, Business Development</td>
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<tr>
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<tr>
<td>Tim Reinert, CPA and CGMA</td>
<td>Director Accounting</td>
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<td>Jim M. Richardson</td>
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<td>Jennifer Marie Russ</td>
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<td>Stephen Siegel</td>
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<td>Anne Simmons</td>
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<tr>
<td>Ryan Stevens</td>
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<tr>
<td>Sarah Stock, CPA</td>
<td>Manager, Reinsurance Reporting</td>
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<td>Steve Stone</td>
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<td>Julie Thelen</td>
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<td>Michele Urzendowski</td>
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<tr>
<td>Rod Van Genderen, CPA, FLMI</td>
<td>Operational Risk Consultant</td>
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<tr>
<td>Brandy Vannoy</td>
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<td>Ryan Wampler</td>
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<td>Rebecca Wiley</td>
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<td>Scott Woodward</td>
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<tr>
<td>Douglas Yenzer</td>
<td>CPA</td>
</tr>
<tr>
<td>Rick Young</td>
<td>Sr. Vice President</td>
</tr>
</tbody>
</table>

Total Participants 78
MIDWEST CHAPTER – IASA  
BALLOT – ELECTION OF OFFICERS FOR CHAPTER YEAR 2018-2019

To vote for each individual, place an “X” on the respective line. One ballot per Member.

**President**  
Jack Maier  
MarksNelson LLC  
Kansas City, MO  
816-743-7700

**Secretary/Treasurer**  
Rod Van Genderen  
Principal Financial Group  
Des Moines, IA  
515-248-4279

**Vice President**  
Julie Leitschuck  
Great West Casualty  
South Sioux City, NE  
402-494-7733

**Vice President**  
Steve Plettau  
Johnson Lambert LLP  
Park Ridge, IL  
847-754-4402

**Vice President**  
Anne Simmons  
BKD, LLP  
Kansas City, MO  
816-221-6300

**Vice President**  
Chris Frazier  
EMC National Life Company  
Des Moines, IA  
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Program Content:
See Conference Booklet.

Program Level, Prerequisites, Advance Preparation, and Type of Delivery Method: All programs utilize a combination of lecture, discussion, etc. and will be delivered live to the attendees. IASA’s goal is to facilitate the full implementation of program concepts in the work environment and to encourage the sharing of program ideas with others in the workplace of program participants. Our programs are created to accommodate participant groups seeking a basic learning experience. In general, no specific prerequisites and/or advance preparation for technical session is required.

Recommended CPE: Earn up to 11 CPE Credits

Registration Information/Instructions: See above.

Refund/Cancellation Policy: See above.

Complaint Resolution Policy: For more information regarding refunds, complaints and/or cancellation policies, please contact our office at 919-489-0991. Or visit our website at www.iasa.org and click on the CPE tab.

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Speaker Bios: are included in your conference booklets for your reference.