2023 CCA Annual Meeting

October 15-18, 2023
Renaissance Nashville Hotel
Nashville, Tennessee

The Conference of Consulting Actuaries is holding the 2023 CCA Annual Meeting from Sunday, October 15th through Wednesday, October 18th at the Renaissance Nashville Hotel in Nashville, Tennessee. Information about this meeting will be available in June of 2023.

Sessions:

001 - Social Security and Medicare - State of the System

October 15, 2023 5:15 PM - 6:55 PM

In 2022 Social Security and Medicare each accounted for 21% of federal spending. Both programs face long-term financing shortfalls, and are frequently the subject of public policy discussions, although little has been done to materially address the long-term sustainability of these programs. Join the Chief Actuary from the Social Security Administration, along with other experts in these programs for a "state of the system" update and discussion of policy alternatives to improve the financial health of each program.

Session Category
Cross Discipline
Credits
CPD: 2.00

Speakers

- 1 . Ellen L. Kleinstuber Bolton Partners, Inc.
- 2 . Frank Todisco U.S. Government Accountability Office
- 3 . Craig P. Rosenthal Mercer
- 4 . Dale H. Yamamoto Red Quill Consulting
- 5 . Stephen C. Goss Social Security Administration
- 6 . Tim Sullivan Aetna
  (Session Assistant)

002 - Business Session & ChatGPT: Opening Bell for a New Era of AI
October 16, 2023 8:00 AM - 10:15 AM

The CCA's Business Session precedes the Monday General Session with the welcoming of attendees, announcement of new directors and officers, Treasurer's Report and presentation of the CCA's annual awards. Our keynote presentation immediately follows. This year is a turning point in public understanding—and concern—about artificial intelligence. The rapid rise of ChatGPT and its clones has been nothing short of astonishing. And it's been matched by an outpouring of dire predictions, from human extinction to massive unemployment. But well before we grapple with existential questions about AI, there will be more practical challenges for business and society. Social, legal and political challenges are imminent, as well as new questions about fair business practices, ethics and liability. As advanced AI grows more common in law, finance, medicine and similar critical professions, additional potential liabilities will arise. Government oversight and regulation are unlikely to keep pace. The first "rules of the road" for AI may come from industry groups seeking to self-regulate, often emphasizing disclosure and transparency. Those efforts will be driven by insurance and legal concerns. Professional services will change with the adoption of cognitive computing. White collar employment, including law and finance, will be impacted, especially among younger workers. The result will be new efficiencies and surprising intelligent services that will challenge us to identify what skills are uniquely human.

Session Category
Cross Discipline
Credits
CPD: 1.50

Speakers

- 1 . Derek N. Guyton
- 2 . Ellen L. Kleinstuber Bolton Partners, Inc.
- 3 . Craig P. Rosenthal Mercer
- 4 . Paul M. Sepe WTW
- 5 . Michael Rogers

101 - Market-Based Cash Balance Plan Accounting
October 16, 2023 10:45 AM - 12:00 PM

Applying traditional defined benefit GAAP accounting rules to market-based cash balance plans produces irrational and volatile results. To address these concerns, the CCA established a working group to study these designs and prepare recommendations for alternative accounting approaches that would better represent the economics of these designs. Speakers provide an update on the findings and recommendations of the working group.

Session Category

Retirement

Credits

EA Core: 0.75
EA Non-Core: 0.75
CPD: 1.50

Speakers

- 1 . Scott A. Hittner October Three LLC
- 2 . Stephen N. Eisenstein KPMG
- 3 . Lawrence J. Sher October Three LLC
- 4 . Brian R. West Newport Group
  (Session Assistant)

102 - What's New in the Annuity Purchase Market?
October 16, 2023 10:45 AM - 12:00 PM

The pension plan annuity purchase market has evolved significantly since 2012 when the GM and Verizon deals ushered in a new era in pension risk management. We've had new entrants into the market, new innovations, and new issues. The panelists in this session discuss what's new in the annuity purchase market from the insurer perspective to ensure that consultants understand how to best approach the market to optimize results for their clients.

Session Category

Retirement

Credits

EA Non-Core: 1.50
CPD: 1.50

Speakers

- 1 . Michael S. Clark Agilis
- 2 . Amanda Egan Mutual of Omaha Insurance Company
- 3 . Richard Michael McEvoy Athene USA
- 4 . Ruth E. Schau Pacific Life Insurance Company
- 5 . Mellissa Lim Reinsurance Group of America, Inc.
- 6 . Jacob H Schneider WTW
  (Session Assistant)

103 - Non-qualified Plans / Executive Benefits
October 16, 2023 10:45 AM - 12:00 PM

Non-qualified Deferred Compensation (NQDC) participants and executives face many challenges in developing effective retirement income strategies that differ in significant ways from those of rank-and-file employees. Speakers explore both the similarities and differences between the two groups and discuss tools and techniques that are most appropriate for those whose assets include NQDC accounts, including a look at the rules on distribution options under IRC Section 409A.

Session Category

Retirement

Credits

EA Non-Core: 1.50
CPD: 1.50

Speakers

- 1 . David Scharf Buck
- 2 . Aaron J.L. Pedowitz Mercer
- 3 . Pete J. Neuwirth CapAcuity

104 - The Opaque Cost of Care: Clear-as-Mud Transparency Data
October 16, 2023 10:45 AM - 12:00 PM

Transparency around the cost of healthcare services has long been a lofty goal, and has made several headlines recently. Presenters share perspectives on transparency-related topics such as: Price comparison tools required under the Transparency in Coverage Final Rule and Consolidated Appropriations Act of 2021; Uses of transparency data despite existing data constraints; Visibility into out-of-network pricing for members, plan sponsors, and providers and impacts of the No Surprises Act; and Cost transparency in the news.

Session Category

Health & Welfare

Credits

CPD: 1.50

Speakers

- 1 . Stephanie Calandro
- 2 . Arthur Smolensky University of Tennessee
- 3 . Tejas Inamdar Turquoise Health

105 - Voluntary Benefits
October 16, 2023 10:45 AM - 12:00 PM

Speakers focus on strategies that address workforce demand for flexibility, personalization and value in supplemental insurance or employee-paid benefits. Come hear carrier, consultant, and innovator perspectives on new insights and trends.

Session Category

Health & Welfare

Credits

CPD: 1.50

Speakers

- 1 . Cheryl A. Ham Aon
- 2 . Art Dickerson TopGear Strategies LLC
- 3 . Marc Lower Aon
- 4 . Randy Finn

106 - ROI of Benefits/Total Rewards
October 16, 2023 10:45 AM - 12:00 PM

Total rewards is one of an employer's largest cash outlays. Is it a cost of doing business or is it an investment in the business? Senior HR leaders share their thoughts on how they maximize the value of their total rewards programs.

Session Category

Cross Discipline

Credits

EA Non-Core: 1.50
CPD: 1.50

Speakers

- 1 . Phillip A. Merdinger October Three
- 2 . Gary Watts Fidelity Information Systems Global
- 3 . Kristina Santos Arxada
- 4 . Casey Shork KPMG
  (Session Assistant)

107 - The CCA White Paper v.2.0
October 16, 2023 10:45 AM - 12:00 PM

In 2014 the CCA published the definitive white paper on actuarial funding policies and practices for public pension plans. The CCA Public Plans Community is currently revising the white paper to reflect practical experience with white paper model practices as well as new ASOP requirements. Panelists discuss the proposed revisions.

Session Category
Public Plans
Credits
EA Non-Core: 1.50
CPD: 1.50

Speakers

- 1 . Paul Angelo Segal
- 2 . Jody B. Carreiro Osborn Carreiro & Associates, Inc.
- 3 . Wendy Tucker Ludbrook Cavanaugh Macdonald Consulting LLC
- 4 . Jordan McClane Bolton Partners, Inc.
- 5 . Elizabeth A. Wiley Cheiron, Inc.
(Session Assistant)

109 - A Sour Mash-Up of Withdrawal Liability
October 16, 2023 10:45 AM - 12:00 PM

A potpourri of timely and relevant topics on withdrawal liability including: update on withdrawal liability interest rate assumptions, Building & Construction Industry withdrawals, offsets from partial withdrawals against later partial and complete withdrawals, two-pool withdrawal liability structures, and relevant Form 5500 changes.

Session Category
Multiemployer Plans
Credits
EA Core: 1.50
CPD: 1.50

Speakers

- 1 . Mitchell H. Hofing Dexter Hofing LLC
- 2 . Jay K. Egelberg First Actuarial Consulting, Inc.
- 3 . Vincent Anthony Regalbuto O'Sullivan Associates
- 4 . Scott Phillip Steadman Bolton Partners, Inc.

Monday Luncheon
October 16, 2023 12:05 PM - 1:30 PM

Women in Consulting Community Luncheon & Forum
October 16, 2023 12:05 PM - 1:30 PM

Confidence in yourself and your work can be imperative for both success and happiness in your professional life. The Women in Consulting Community is excited to host a session at the CCA Annual Meeting on this important topic that was also the latest focus of our book club. Through our book club discussions, we found the concept of 'confidence', particularly with women, has many layers and everyone has something to share and learn. We hope you can join us for an engaging panel discussion to hear speakers' personal experiences on confidence and how we can build confidence in ourselves and the women around us. All are welcome to attend this session and we look forward to providing an engaging, interactive discussion. Neither CCA nor Women in Consulting Community membership is required to attend.

Session Category
Cross Discipline

Speakers

- 1 . Emojoy Brown BlackRock
- 2 . Jessica Kachur Mercer
- 3 . Danielle Almeida Buck, A Gallagher Company

201 - ASOP 27/35 Review
October 16, 2023 2:00 PM - 3:15 PM

ASOP 27 has been revised to include ASOP 35, which will be retired once ASOP 27 is effective. Learn what has been changed.

Session Category
Retirement
Credits
EA Core: 1.50
CPD: 1.50

Speakers

- 1 . Sarah E. Dam Community Bank System Inc
- 2 . Julie M. Ferguson Mercer
- 3 . Suzanne Kay Hughes Buck
(Session Assistant)

202 - SECURE 2.0 - What's in it for DC Plans?
October 16, 2023 2:00 PM - 3:15 PM

The SECURE 2.0 Act has continued the themes and reforms of the SECURE Act of 2019, which were getting more participants into the retirement system, providing participants ways to accumulate more assets and ensuring participants are connected with those assets when retirement comes. Speakers provide an overview of the key SECURE 2.0 provisions impacting DC plans, including any guidance available on such provisions and any provisions that still are in need of guidance.

Session Category
Retirement
Credits
EA Non-Core: 1.50
CPD: 1.50

Speakers

- 1 . Jeremy P. Olszewski Fidelity Investments
- 2 . Dominic DeMatties Thompson Hine LLP
- 3 . Stacey Marie Schmid Empower
- 4 . Ryan Potter
(Session Assistant)

203 - Window Programs and Workforce Reductions: Design, Administration, and Strategy
October 16, 2023 2:00 PM - 3:15 PM

Economic trends and company-specific needs often lead to workforce changes. Retirement plans can often be used to facilitate a smooth transition for affected employees. Speakers discuss the strategic, logistical, compliance, and accounting aspects of early retirement windows and other workforce management initiatives.

Session Category
Retirement
Credits
EA Core: 0.75
EA Non-Core: 0.75
CPD: 1.50

Speakers

- 1 . Craig P. Rosenthal Mercer
- 2 . David R. Godofsky Alston & Bird, LLP
- 3 . Aaron Rothstein Buck
- 4 . Casey Shork KPMG
  (Session Assistant)

204 - Employer Perspective of Point Solution ROI
October 16, 2023 2:00 PM - 3:15 PM

There is a myriad of innovative health care point solutions on the market today that work in tangent with a health plan. Employers and other health plan sponsors are inundated with claims about their advantages to the plan members and sponsors. This session, with panelists representing three large employers, addresses the process to identify the type of solutions that are relevant to their needs, the metrics that are important to evaluate, implementation issues, performance guarantees, methods of estimating savings, and other considerations in managing these vendors.

Session Category
Health & Welfare
Credits
CPD: 1.50

Speakers

- 1 . Edward M. Pudlowski MorningStar Actuarial Consulting, LLC
- 2 . Nathan Thomas Counts Amtrack
- 3 . Benjamin Patrick Hagan AT&T
- 4 . Scott Ramsay Prudential Ins Co of America
- 5 . Samantha Meyer Buck
  (Session Assistant)

205 - Current Topics in Medicare Advantage and Part D Products
October 16, 2023 2:00 PM - 3:15 PM

Speakers highlight current topics in Medicare Advantage and Part D using an interactive format including presentations, polling, and audience participation. Topics include Medicare Advantage, Part D, and employer-sponsored Medicare plans.

Session Category
Health & Welfare

Credits

CPD: 1.50

Speakers

- 1 . David M. Tuomala Optum
- 2 . Ward A. Brigham UnitedHealthcare
- 3 . Dan Hoffman Optum
- 4 . Jennifer Carioto Milliman
- 5 . Diep Do Stephan Deloitte Consulting LLP (Session Assistant)

206 - Bias: Good, Bad, or a Fact of Life?

October 16, 2023 2:00 PM - 3:15 PM

Biases. We all have them and we all deal with them in our work. Whether cognitive, social, or statistical in nature, bias creeps into actuarial work. Is bias bad, or can it be a good thing? Is it neither, and simply something for actuaries to identify, understand, and manage? How do we accomplish that? Join this interactive session as our panelists and audience discuss and debate different types of biases actuaries encounter in our work.

Session Category

Cross Discipline

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . Ellen L. Kleinstuber Bolton Partners, Inc.
- 2 . David Scharf Buck
- 3 . Rebecca O'Loughlin Trauger Bolton
- 5 . Shelley Yunjie Zhao Aon
- 6 . Kristi C. Garrington Horizon Actuarial (Session Assistant)

207 - Service Purchases in Public Retirement Systems

October 16, 2023 2:00 PM - 3:15 PM

Speakers explore technical aspects and implications of service purchase programs in public employee retirement systems.

Session Category

Public Plans

Credits

EA Non-Core: 1.50
CPD: 1.50

Speakers

- 1 . Elizabeth A. Wiley Cheiron, Inc.
- 2 . Robert (Andy) Blough Indiana Public Retirement System
- 3 . Koren L. Holden Colorado PERA
- 4 . Paul Angelo Segal
- 5 . Jolene Roe Deloitte Consulting LLP
  (Session Assistant)

208 - M&A Outlook
October 16, 2023 2:00 PM - 3:15 PM

Come participate in a deep dive into pension challenges in M&A selling from diligence to execution. What are the financial and operational implications of pension plans across the world? Speakers discuss assessing accounting impact on the deal including key differences in accounting standards, assumption setting, impact of operational challenges related to pension on deal timeline and execution.

Session Category

International

Credits

EA Non-Core: 1.50
CPD: 1.50

Speakers

- 1 . Mike Spetko Deloitte Consulting LLP
- 2 . James L. Jones EY

209 - Yo-Yo'ing Return Expectations
October 16, 2023 2:00 PM - 3:15 PM

Capital market dynamics change over time, and connect directly to return expectations. Panelists review the impact of rising and falling interest rates and stock pricing multiples on capital market models and expectations for portfolio returns.

Session Category

Investments

Credits

EA Non-Core: 1.50

CPD: 1.50

Speakers

- 1 . Jerry Mingione The Terry Group
- 2 . Travis Simon Mercer

301 - Nerdle aka ERISA Trivia
October 16, 2023 3:45 PM - 5:00 PM

ERISA turns 50 next year. Whether you are under age 50 or already have passed that mark, don't let a refined knowledge of ERISA remain on your actuarial bucket list. Attend this session and start scratching that item off this year.

Session Category
Retirement
Credits
EA Core: 1.50
CPD: 1.50

Speakers

- 1 . Grace Barbieri Mercer
- 2 . Rebecca Bak Fidelity Investments
- 3 . Lisa Bjornson Buck
- 4 . Theophilus Chukwueke

302 - Hedging Pension Liabilities
October 16, 2023 3:45 PM - 5:00 PM

Panelists discuss the issues around hedging liabilities (i.e., minimum funding, PBGC, accounting, and termination) including the different risk factors involved. They discuss the practical implementation of hedging strategies along with current challenges to hedging pension liabilities today. Panelists also discuss the role that pension actuaries can play to help facilitate a successful hedging strategy with their clients.

Session Category
Retirement
Credits
EA Non-Core: 1.50
CPD: 1.50

Speakers

- 1 . Michael S. Clark Agilis
- 2 . Joseph C. Anzalone Agilis
- 3 . Sweta Vaidya YMCA Retirement Fund
- 4 . Daniel Philip Cassidy Cassidy Retirement
- 5 . Jonathan D. Price Segal
  (Session Assistant)

303 - Suddenly Funded
October 16, 2023 3:45 PM - 5:00 PM

With the recent rise in interest rates many plans are now looking much better funded, and may be within reach of terminating, but is that the only option? What about re-opening the plan, or are there other options altogether? Panelists discuss the pros and cons of termination, continued hibernation, and re-opening along with some ways to use any plan overfunding.

Session Category
: Retirement

Credits
: EA Non-Core: 1.50
: CPD: 1.50

Speakers

- 1 . John Malcolm Merrill Nyhart
- 2 . Kaushik Mehta Mercer
- 3 . Justin F. Greindl Fidus Actuarial Solutions
- 4 . Michael Antoine Buck

304 - Retiree Healthcare - State of the Market
October 16, 2023 3:45 PM - 5:00 PM

Retiree healthcare continues to be a front page topic. Economic pressures are squeezing participant budgets and sponsors are looking to best deploy resources to meet legacy commitments effectively. In Washington, while the Inflation Reduction Act has provided a boost to benefits for all retirees, but budget hawks are beginning to reappear and talk of changes to Medicare eligibility is growing louder. Our panel covers these topics and provide a current picture of retire healthcare markets. Additionally, panelists offer thoughts on trends within these markets and identify potential opportunities for consultants to help their clients best leverage them.

Session Category
: Health & Welfare

Credits

EA Non-Core: 1.50
CPD: 1.50

Speakers

- 2 . Christine Kourouklis Blue Cross/Blue Shield of IL, TX, OK, NM & MT
- 3 . Barry Carleton WTW
- 4 . Steven D. Draper Ernst & Young, LLP
  (Session Assistant)

305 - What's up with Getting Paid for Not Working?
October 16, 2023 3:45 PM - 5:00 PM

Ever wonder how your clients are reacting to legislative changes and other external influences (like COVID) on short-and long-term disability programs? Speakers discuss those topics and how paid family and medical leave are influencing the increasing disability costs.

Session Category

Health & Welfare

Credits

CPD: 1.50

Speakers

- 1 . Dale H. Yamamoto Red Quill Consulting
- 2 . Kimberly Stattner Trion
- 3 . Richard Clement

306 - Captive Insurance Companies
October 16, 2023 3:45 PM - 5:00 PM

Captive insurance companies are a risk management tool used in healthcare, pensions, life insurance, and casualty. A panel of experienced practitioners discuss how captive are used in these businesses.

Session Category

Cross Discipline

Credits

CPD: 1.50

Speakers

- 1 . Justin N. Hornburg Justin Hornburg Consulting

- 2 . Jennifer Nelson Schaefgen American Benefits Consulting
- 3 . Daniel A. Linton Pinnacle Actuarial Resources, Inc.

307 - Federal Laws and Congressional Activity Applicable to Public Plans

October 16, 2023 3:45 PM - 5:00 PM

Panelists review the Internal Revenue Code and other federal regulations that apply to public plans and their members. Recent changes, proposed legislation, and notable litigation are also addressed.

Session Category

Public Plans

Credits

EA Non-Core: 1.50
CPD: 1.50

Speakers

- 1 . Michael J. de Leon Deloitte
- 2 . Audra Ferguson-Allen Ice Miller LLP
- 3 . Todd N. Tauzer Segal
- 4 . Joseph Michael Kropiewnicki Deloitte Consulting LLP (Session Assistant)

308 - Liability Duration Hedging Exotics

October 16, 2023 3:45 PM - 5:00 PM

Gain a view into a non-traditional liability duration hedging including lessons from the UK and how might pension risk managers apply these strategies in the future.

Session Category

International

Credits

EA Non-Core: 1.50
CPD: 1.50

Speakers

- 1 . Mike Spetko Deloitte Consulting LLP
- 2 . Bobby Riddaway Capital Cranfield
- 3 . Bob Penter Aon

309 - Dueling Multiemployer Actuaries: Gray Areas
October 16, 2023 3:45 PM - 5:00 PM

In this Monday multiemployer tradition, panelists present opposing views of various topics where there may be no absolutely right answer, and you get to decide who's most correct.

Session Category
Multiemployer Plans
Credits
EA Core: 1.50
CPD: 1.50

Speakers

- 1 . Troy Jaros
- 2 . Scott Phillip Steadman Bolton Partners, Inc.
- 3 . John Michael Redmond
- 4 . Jake Libauskas
- 5 . Keith L. Nichols USI Consulting Group

401 - Plan Terminations: Nuts & Bolts, PBGC Input, and Small Plans
October 17, 2023 8:00 AM - 9:40 AM

The nuts and bolts of the plan termination process, including small plans and nuances. PBGC input on what they want and issues they've seen will be included.

Session Category
Retirement
Credits
EA Core: 2.00
CPD: 2.00

Speakers

- 1 . Meryl A. Feigenbaum Buck
- 2 . Sonja J. Coffin Fidelity Investments
- 3 . Sara Eagle Pension Benefit Guaranty Corp.
- 4 . Hilja Viidemann Buck
  (Session Assistant)

402 - Accounting for Postretirement Defined Benefit Plans Can be Challenging
October 17, 2023 8:00 AM - 9:40 AM

The postretirement defined benefit plan landscape changes frequently (e.g. lump sum windows, annuity purchases, spinoffs, mergers, business combinations, plan changes, etc.). Clients look to consulting actuaries for guidance on the accounting effects of different events. Clients also look to consulting actuaries for actuarial assumption guidance. At this session, actuaries from accounting firms discuss challenges faced, how they worked with auditors, consulting actuaries, and clients; and resolution considerations based on their experiences and observations. Join us for an interactive session.

Session Category
Retirement
Credits
EA Non-Core: 2.00
CPD: 2.00

Speakers

- 1 . Stephen N. Eisenstein KPMG
- 2 . Philip Bonanno Grant Thornton LLP
- 3 . Andrew Christian Etheridge Grant Thornton LLP
- 4 . Kelly A. Fischer Deloitte Consulting LLP
  (Session Assistant)

403 - Latest Developments in Mortality Analysis and Projections
October 17, 2023 8:00 AM - 9:40 AM

Come learn about recent developments in the world of mortality. In this session, speakers discuss the state of mortality improvement and the interplay between experience studies, augmented mortality models, and credibility analysis. Why are experience studies important? What are some of the considerations for improvement models? And how can we incorporate this latest thinking when consulting with our clients? How can credibility analysis be used with augmented mortality models? Hear our panel of mortality experts address these issues and more in this not-to-be missed session.

Session Category
Retirement
Credits
EA Core: 2.00
CPD: 2.00

Speakers

- 1 . David Scharf Buck
- 2 . Erik Pickett Club Vita
- 3 . James G. Berberian Buck
- 4 . Ellen L. Kleinstuber Bolton Partners, Inc.
- 5 . Yangyan Hu
  (Session Assistant)

404 - Actuaries and Providers - Working Toward the Quintuple Aim
October 17, 2023 8:00 AM - 9:40 AM

We all believe that the rise in healthcare costs is unsustainable. At the same time we also believe that the rise in costs is not translating to better overall health. In this session, panelists discuss how providers are working on improving cost, quality, patient experience, provider experience, and health equity (the quintuple aim). We also discuss how actuaries are increasingly involved in helping providers achieve these goals.

Session Category
  Health & Welfare
Credits
  CPD: 2.00

Speakers

- 1 . Yi-Ling Lin The Terry Group
- 2 . Robert L. Schenck The Terry Group
- 3 . Aaron Paul Jurgaitis
- 4 . Thomas Edward Persichetti Persichetti & Associates, LLC

405 - Thinking About OPEB Valuation Assumptions for Medicare Advantage and Part D Plans
October 17, 2023 8:00 AM - 9:40 AM

More plans sponsors are adopting Medicare Advantage and Part D plans in their retiree health programs. What considerations should be made in projecting to costs of these programs, especially in light of the latest legislation (Inflation Reduction Act)?

Session Category
  Health & Welfare
Credits
  CPD: 2.00

Speakers

- 1 . Rebecca O'Loughlin Trauger Bolton
- 2 . John V. Grosso Home
- 3 . Martin W. Hill Martin Hill
- 4 . Dan Hoffman Optum
- 5 . Jim Whelpley Rael & Letson
- 6 . Dale H. Yamamoto Red Quill Consulting
- 7 . Steven D. Draper Ernst & Young, LLP
  (Session Assistant)

406 - Practical Actuarial Applications of Data Analytics
October 17, 2023 8:00 AM - 9:40 AM

Data analytics and Artificial Intelligence are increasingly used in actuarial work. Our panelists discuss how these tools are used in everyday, practical actuarial applications.

Session Category
  Cross Discipline
Credits
  EA Non-Core: 2.00
  CPD: 2.00

Speakers

- 1 . Justin N. Hornburg Justin Hornburg Consulting
- 3 . Nick Pearce McGriff
- 4 . Anthony Favry MetLife
- 5 . Dong Liu

407 - Disaffiliation/With"drawl"
October 17, 2023 8:00 AM - 9:40 AM

Some public plans allow both affiliation and disaffiliation. Why and how does this happen? What are the typical practices? Come and listen in and/or participate in an in-depth discussion of the complexities of allowing disaffiliation from public pension plans, particularly for a plan in an underfunded position.

Session Category
  Public Plans
Credits
  EA Non-Core: 2.00
  CPD: 2.00

Speakers

- 1 . Todd N. Tauzer Segal
- 2 . Koren L. Holden Colorado PERA
- 3 . Alex Brown NASRA
- 4 . Robert L. Schmidt
- 5 . Brett Michael Hunter Buck Global LLC
  (Session Assistant)

408 - Wealth Equity
October 17, 2023 8:00 AM - 9:40 AM

Gender equity is often looked at through a single lens of pay, career or leadership representation although the underlying factors that lead to gender inequities are multi-faceted. In this session, presenters look at gender wealth inequity which is an overlooked but long-standing issue affecting women. They explain what gender wealth equity is and the need for developing a multidimensional approach to elevate gender wealth equity. They also share surprising country comparisons and insights from a collaboration between WTW and the World Economic Forum that may give you a new appreciation around the need for global action. A live panel discussion brings the research and actions to life.

Session Category
: International

Credits
: EA Non-Core: 2.00
: CPD: 2.00

Speakers

- 1 . Paul M. Sepe WTW
- 2 . Manjit Basi Manjit Kaur
- 3 . Benjamin Patrick Hagan AT&T
- 4 . Riddhi Patel The Walt Disney Company
- 5 . Cathy Spencer AllianceBernstein

409 - Pension Investing: Emerging Issues
October 17, 2023 8:00 AM - 9:40 AM

The pension investment environment is continuously evolving. Speakers cover emerging views and approaches in liability-driven investing, risk transfer and the use of non-liquid alternatives. Presenters also review the pros and cons of the recently controversial ESG (environmental, social, and corporate governance) investment approach.

Session Category

Investments

Credits

EA Non-Core: 2.00
CPD: 2.00

Speakers

- 1 . Yubo Wang Principal Financial Group
- 2 . David Murad NISA
- 3 . Richard Royce Ford Callan
- 4 . Jessica Kachur Mercer
- 5 . Emojoy Brown BlackRock
(Session Assistant)

501 - Late Breaking Developments
October 17, 2023 10:10 AM - 11:50 AM

Speakers discuss the latest developments in the private pension sector. Recent rulings and regulations - proposed and final - are covered in addition to pending retirement plan legislation and recent litigation activity.

Session Category

Retirement

Credits

EA Core: 2.00
CPD: 2.00

Speakers

- 1 . Jeremy P. Olszewski Fidelity Investments
- 2 . Maria M. Sarli WTW
- 3 . Bruce Cadenhead Mercer
- 4 . Rachel Barnes Nyhart
- 5 . Christopher Denning Internal Revenue Service

502 - Evolving Retirement Landscape
October 17, 2023 10:10 AM - 11:50 AM

What do employees want out of their retirement program? How will employers meet these needs in the coming decade? Speakers discuss the recent SOA survey and new/emerging trends in the retirement landscape.

Session Category

Retirement

Credits

EA Core: 1.00
EA Non-Core: 1.00
CPD: 2.00

Speakers

- 1 . Craig P. Rosenthal Mercer
- 2 . Tonya B. Manning Buck
- 3 . Lee D. Gold Mercer
- 4 . Robert J. Reiskytl Aon
- 5 . Julie M. Reyes Fidelity Investments
(Session Assistant)

503 - Plan Administration: EPCRS and SECURE 2.0

October 17, 2023 10:10 AM - 11:50 AM

Correcting administrative errors may be one of the few things more complicated than administering pension plans. Luckily the SECURE 2.0 Act of 2022 has made it a little easier. Come learn about the recent changes to the IRS Employee Plans Compliance Resolution System (EPCRS) and what it means going forward.

Session Category

Retirement

Credits

EA Core: 2.00
CPD: 2.00

Speakers

- 1 . John Malcolm Merrill Nyhart
- 2 . Sherrie Boutwell Boutwell Fay LLP
- 3 . Margaret S. Berger Mercer
- 4 . Paul D. Krueger WTW

504 - Prescription Drug Update: Indications are Just Guidelines

October 17, 2023 10:10 AM - 11:50 AM

Panelists provide an update on recent hot topics in pharmacy drug usage and benefits including obesity drugs, shortages of diabetic drugs, biosimilars and specialty drugs, pharma negotiations, and the uncertainty of the Inflation Reduction Act.

Session Category

Health & Welfare

Credits

CPD: 2.00

Speakers

- 1 . Ian M. Smith Optum
- 2 . Jonathon Patrick Lewis
- 3 . Sarah M. Martin Lockton Dunning
- 4 . Travis Baughn OptumRx
- 5 . Kristi C. Garrington Horizon Actuarial (Session Assistant)

505 - The Role of AI in Employer-Sponsored Healthcare

October 17, 2023 10:10 AM - 11:50 AM

The machines are coming! ChatGPT and other advanced AI and analytic technologies are becoming increasingly prevalent in today’s workplace. Learn about what these technologies do, how they are being used, how bias may impact these models, and how they will shape the future of work in actuarial consulting, healthcare and beyond.

Session Category

Health & Welfare

Credits

CPD: 2.00

Speakers

- 1 . John McAndrew Lockton Companies
- 2 . Todor Penev Aon
- 3 . James Dolstad Optum
- 4 . Jason Juliano EisnerAmper
- 5 . Lindsay Allen Aetna

506 - I Walk the Line
October 17, 2023 10:10 AM - 11:50 AM

Consulting is a fine line to walk between understanding how to solve client problems and matching the solutions you have to offer. Sometimes the client isn't receptive to a solution that makes sense to you. Sometimes you are being asked to offer solutions or products that don't make sense to the client. During this interactive session, the audience is presented with case studies and asked to discuss the scenario and ways to deal with the tough conversations.

Session Category

Cross Discipline

Credits

EA Non-Core: 2.00
CPD: 2.00

Speakers

- 1 . Patricia A. Rotello
- 2 . Christopher Roy Snell Colgate-Palmolive
- 3 . Alicia Beth Traviss Athena Actuarial
- 4 . Justin N. Hornburg Justin Hornburg Consulting
- 5 . Michelle Boyles
  (Session Assistant)

507 - How Pension Plan Designs Affect Your Workforce
October 17, 2023 10:10 AM - 11:50 AM

Retirement benefit plan designs can influence the workforce behavior, attracting young new hires and encouraging others to retire or terminate. For example, DROPs (Deferred Retirement Option Plans) may be used to retain older employees. Early Retirement Windows (including potential coordination with Retiree Health enhancements) may incentivize older members to retire. Enhanced Defined Benefit plan provisions and/or Defined Contribution supplemental plans might attract younger people. Additionally, employers covering all or part of member contributions can be utilized as well.

Session Category

Public Plans

Credits

EA Non-Core: 2.00
CPD: 2.00

Speakers

- 1 . Todd David Kanaster S&P Global
- 2 . Kevin Scott Spanier Buck
- 3 . Daniel James Siblik
- 4 . Edward Oliphant Nashville MTA
- 5 . Dan Doonan National Institute on Retirement Security
- 6 . Matthew Patrick Staback Buck Global LLC
  (Session Assistant)

508 - Carving Out a New Company
October 17, 2023 10:10 AM - 11:50 AM

Speakers discuss a variety of HR topics to address when standing-up a carve-out of a global business to create a new company, from legal entities and employment types to challenges of replicating employee terms and conditions including compensation and benefits programs.

Session Category
: International

Credits
: EA Non-Core: 2.00
: CPD: 2.00

Speakers

- 1 . Mike Spetko Deloitte Consulting LLP
- 2 . Yanning Sun Deloitte Consulting LLP
- 3 . Vaibhavi V. Patel WTW
- 4 . Leeanne O'Callaghan KPMG
- 5 . James L. Jones EY

509 - Now That We Have Funds What're We Gonna Do With Them?
October 17, 2023 10:10 AM - 11:50 AM

Deeply troubled multiemployer plans got a helping hand with the Special Finance Assistance program. Now assistance is arriving and insolvency in plans is no longer imminent. Actuaries and investment professionals discuss investment strategies.

Session Category
: Multiemployer Plans

Credits
: EA Core: 2.00

CPD: 2.00

Speakers

- 1 . Mariah Becker NCCMP
- 2 . Maria Kirilenko
- 3 . Danielle N. Singer Invesco Ltd.
- 4 . Justin Teman Loomis Sayles
- 5 . Seth Almaliah Segal Marco Advisors
- 6 . Martin Jaugietis BlackRock

003 - Ethics
October 17, 2023 1:00 PM - 2:40 PM

Come get your 2.0 EA Ethics credits as we discuss case studies covering ethical challenges and dilemmas facing pension actuaries. Audience participation is highly encouraged.

Session Category
Retirement
Credits
EA Ethics: 2.00
CPD: 2.00

Speakers

- 2 . Bruce Cadenhead Mercer
- 3 . Lauren Klein Fidelity Investments
- 4 . Samantha Klingler Mercer
- 5 . Mariah Becker NCCMP

004 - Professionalism and Ethics for Healthcare Actuaries
October 17, 2023 1:00 PM - 2:40 PM

This interactive session covers real-life client situations where panelists have written their own case studies and share their experiences, recommendations, and make reference to ASOPs and Precepts. This session is designed to engage the audience and challenge viewpoints on professionalism and ethics. There are prizes for engagement.

Session Category
Health & Welfare
Credits
CPD: 2.00

Speakers

- 2 . Dean W. Kepraios Alvarez & Marsal
- 3 . Cheryl A. Ham Aon
- 4 . Edward M. Pudlowski MorningStar Actuarial Consulting, LLC
- 5 . David M. Tuomala Optum
- 6 . Justin N. Hornburg Justin Hornburg Consulting
- 7 . Dale H. Yamamoto Red Quill Consulting

Healthcare Community Forum
October 17, 2023 3:00 PM - 4:00 PM

The CCA Healthcare Community meets to discuss current issues, outlooks, and news. Neither CCA nor Healthcare Community membership is required to attend.

Session Category
    Health & Welfare

Multiemployer Plans Community Forum
October 17, 2023 3:00 PM - 4:00 PM

Come to engage in a group discussion with your fellow multiemployer practitioners on the hot topics that affect your consulting practice. While forum leaders will suggest topics, please bring your own burning questions as well.

Session Category
    Multiemployer Plans

Public Plans Community Forum
October 17, 2023 3:00 PM - 4:00 PM

The Public Plans Community meets to discuss current issues, outlooks, and news. Neither CCA nor Public Plans Community membership is required to attend.

Session Category
    Public Plans

Smaller Actuarial Consulting Firms Community Forum
October 17, 2023 3:00 PM - 4:00 PM

The Smaller Actuarial Consulting Firms Community meets to discuss current issues, outlooks, and news. Neither CCA nor Smaller Actuarial Consulting Firms Community membership is required to attend.

Session Category
Cross Discipline

Leadership Development Community Forum
October 17, 2023 4:05 PM - 5:00 PM

Expectations are a powerful force and therefore managing them is key to a consulting actuary's success. Join the Leadership Development Community interactive workshop to learn and practice how to manage expectations to improve your success as a consultant/leader/team member/human. Neither CCA nor Leadership Development Community membership is required to attend.

Session Category
Cross Discipline

Speakers

- 1 . Michael S. Clark Agilis

601 - Working With PBGC
October 18, 2023 8:00 AM - 9:15 AM

Panelists discuss issues relating to single-employer plans and PBGC that companies may face. Speakers discuss recent developments and provide practical tips and best practices for working with PBGC. Topics include standard terminations, distress and involuntary terminations, the early-warning program, 4010 filings, reportable events, 4062(e) liability, coverage, recent guidance and developments, and the Advocate.

Session Category
Retirement
Credits
EA Core: 1.50
CPD: 1.50

Speakers

- 1 . Scott A. Hittner October Three LLC
- 2 . Katherine B. Kohn Thompson Hine LLP
- 3 . Israel Goldowitz Wagner Law Group
- 4 . Tiera Wiegand Willis Towers Watson
  (Session Assistant)

602 - Strategic DC Plan Design in a Post-SECURE 2.0 World
October 18, 2023 8:00 AM - 9:15 AM

With SECURE 2.0 now law, what does that mean for designing DC plans? How do the SECURE 2.0 required provisions impact the rest of the design of the DC plan and what are the benefits of including the optional provisions provided under SECCURE 2.0? Panelists provide their thoughts on the answers to these questions. Features such as allowing employer contributions to be contributed as Roth, matching student loan payments, adding in-plan emerging savings accounts and more are addressed.

Session Category
    Retirement
Credits
    EA Non-Core: 1.50
    CPD: 1.50

Speakers

- 1 . Aaron Ken Korthas Fidelity Investments
- 2 . Dan Froehlich Fidelity Investments
- 3 . Marina Edwards Marina Retirement, LLC
- 4 . Ruth E. Schau Pacific Life Insurance Company

603 - Small Plan Design
October 18, 2023 8:00 AM - 9:15 AM

Does small plan design seem like Jason seeking the golden fleece? Do these testy waters give you fear and trepidation or do they excite you with a spirit of adventure? Learn how to remove the mythology out of small plan design and construct solutions your clients will treasure!

Session Category
    Retirement
Credits
    EA Core: 1.50

CPD: 1.50

Speakers

- 1 . Richard O. Goehring Richard O. Goehring, Inc.
- 2 . Lawrence Deutsch Larry Deutsch Enterprises
- 3 . Kelsey Mayo Poyner Spruill
- 4 . Thomas More Zavist Zavist and Company LLC

604 - Trends in Provider Reimbursements
October 18, 2023 8:00 AM - 9:15 AM

Come learn about trends in provider networks, negotiations and payments models, how the pandemic has impacted costs/utilization, and how inflation factors into reimbursements in both FFS and value-based arrangements. We'll also cover trends in network size and the potential for upcharging/payment innovation to make up for lost revenue during the pandemic.

Session Category
Health & Welfare
Credits
CPD: 1.50

Speakers

- 1 . Rebecca O'Loughlin Trauger Bolton
- 2 . Molly Lowry Whittle
- 3 . Jin Huang Haag CIGNA
- 4 . Glenn Gerhard

605 - Healthcare Cost Impact of Climate Change
October 18, 2023 8:00 AM - 9:15 AM

As climate change continues to dominate the social and political landscape, we examine the possible implications from a healthcare cost point of view. How will employer population risks shift as the climate evolves? What will we need to do to manage the shifting geography for tropical diseases? What, if anything, will reduce costs as certain areas of the country experience less frigid winters? Join our experts and find out.

Session Category
Health & Welfare
Credits
CPD: 1.50

Speakers

- 1 . Tim Stawicki WTW
- 2 . Drew E. Hodgson Willis Towers Watson
- 3 . Karen Elizabeth Simmons Willis Towers Watson
- 4 . Todd Thames Included Health

Sessions:

606 - What I Really Meant to Say
October 18, 2023 8:00 AM - 9:15 AM

Words matter. This is more important than ever to manage, especially in the world of impersonal email communications and less frequent personal interactions. The speakers address the dos and don'ts of communicating with clients in a more distant work environment, and how to control your messaging to maintain a healthy working relationship.

Session Category
Cross Discipline
Credits
EA Non-Core: 1.50
CPD: 1.50

Speakers

- 1 . Patricia A. Rotello
- 2 . John H. Lowell October Three Consulting LLC
- 3 . Jessica Kachur Mercer
- 4 . Rob O Bacher RBC Total Rewards & Actuarial Solutions

607 - Revised ASOP No. 4 Requirements (in Addition to LDROM)
October 18, 2023 8:00 AM - 9:15 AM

In December 2021, the Actuarial Standards Board (ASB) adopted a revision to Actuarial Standard of Practice (ASOP) No. 4, Measuring Pension Obligations and Determining Pension Plan Costs or Contributions. The revised ASOP No. 4 is effective for any actuarial report that is issued on or after February 15, 2023 and the measurement date in the actuarial report is on after February 15, 2023. The revision to ASOP No. 4 that has received the most attention in the public plan actuarial community is the required calculation and disclosure of a liability referred to by the ASOP as the “Low-Default-Risk Obligation Measure” (LDROM). However, there are other very significant revisions included in the revision to ASOP No. 4 that are worthy of discussion and scrutiny, including the calculation and disclosure of a reasonable actuarially determined contribution “reasonable ADC” and additional guidance regarding amortization methods, funding policy and contribution allocation procedures. Please join us as the speakers discuss all of the revised requirements of ASOP No. 4 – not just the elephant in the room (LDROM requirement).

Session Category

Public Plans

Credits

EA Core: 1.50
CPD: 1.50

Speakers

- 1 . Lance J Weiss Gabriel Roeder Smith & Company
- 2 . Elizabeth A Wiley Buck
- 3 . Christine M O'Neal Deloitte Consulting LLP
- 4 . Steve M Flint WTW
  (Session Assistant)

608 - International Diversity
October 18, 2023 8:00 AM - 9:15 AM

The incorporation of diversity, equity, and inclusion in corporate culture is a global movement. But how is diversity viewed globally? What approaches to increased diversity have global companies taken? What is the intersection of professionalism and DE&I? Speakers from consulting and corporate environments discuss these issues and how approaches to DE&I differ globally.

Session Category

International

Credits

CPD: 1.50

Speakers

- 1 . John W. Robinson Robinson Associates LLC
- 2 . Tonya B. Manning Buck
- 3 . Enrique Schulz PwC
- 4 . James L. Jones EY
- 5 . Juan Alfonso Carrillo WTW

609 - Planning for Long-Term Stability
October 18, 2023 8:00 AM - 9:15 AM

Now that ARPA has provided a lifeline to sinking plans, presenters examine various potential approaches to enhancing the stability of multiemployer plans, and try to predict how those approaches might influence future trends. Speakers discuss both hypothetical strategies, and real world examples that illustrate how plans are proactively working to address the risks and concerns of their stakeholders.

Session Category
Multiemployer Plans
Credits
EA Non-Core: 1.50
CPD: 1.50

Speakers

- 1 . Bryan McCormick CBIZ
- 2 . Joshua Shapiro Groom Law Group, Chartered
- 3 . James Andrew Nolan Segal
- 4 . Kenneth Densmore Horizon Actuarial Services, LLC

701 - PBGC Update for Single and Multiemployer Actuaries
October 18, 2023 9:30 AM - 10:45 AM

PBGC representatives discuss current topics and issues relevant to single and multiemployer retirement plans.

Session Category
Retirement
Credits
EA Core: 1.50
CPD: 1.50

Speakers

- 1 . Amy C. Viener Pension Benefit Guaranty Corp.
- 2 . Darren Michael French Pension Benefit Guaranty Corp.

702 - Improving Actuarial Reports and Communications
October 18, 2023 9:30 AM - 10:45 AM

Have you ever received a client email saying, "Fabulous actuarial report you sent. I just couldn't stop reading it." Indeed, this may seem like actuarial fantasy or science fiction. While this session will remain reality based, why not attend and discover how your reports and communications can become at least a little more intriguing.

Session Category
Retirement
Credits
EA Core: 0.75
EA Non-Core: 0.75
CPD: 1.50

Speakers

- 1 . Richard O. Goehring Richard O. Goehring, Inc.
- 2 . Michael S. Clark Agilis
- 3 . Tristan T. Christ WTW
- 4 . Jennifer Turk Nyhart

703 - The Effect of the SECURE Act on Small Plans
October 18, 2023 9:30 AM - 10:45 AM

Small plan actuaries need to be aware of the SECURE 2.0 Act's provisions in order to help their clients comply with the new rules. Topics include closed plan rule changes, retroactive plan adoption, retroactive amendments as well as various defined benefit provision changes.

Session Category
Retirement
Credits
EA Core: 1.50
CPD: 1.50

Speakers

- 2 . Kevin Joseph Donovan Pinnacle Plan Design, LLC
- 3 . Kelsey Mayo Poyner Spruill

704 - SOA Research: Actuaries' Contributions to Some of the Hottest Topics in Healthcare

October 18, 2023 9:30 AM - 10:45 AM

Many of us use SOA research in our work. Learn how the SOA approaches research from inception of ideas through peer review to release of the research. Research projects currently in process will be highlighted, and two of those projects will be reviewed by their researchers. First, research on high cost members, the 5% of the population that drives 50% of total healthcare cost will be presented. Second, digital health played a huge role in transforming healthcare during COVID. This research paper summarizes the massive amounts of literature review on digital health as well as actuarial analysis on digital health's longitudinal impact across numerous areas of the healthcare system.

Session Category

Health & Welfare

Credits

CPD: 1.50

Speakers

- 1 . Achilles Natsis Society of Actuaries
- 2 . James Dolstad Optum
- 3 . David M. Tuomala Optum
- 4 . Joan C. Barrett Axene Health Partners, LLC

705 - You Said All Healthcare is Local? What do I Need to Know?

October 18, 2023 9:30 AM - 10:45 AM

With technological advancements that make it easier to administer more complex and individualized healthcare programs, many employers are returning to models that leverage the best providers and carriers for their distinct geographic locations. Our speakers take you on a journey through the value of understanding regional issues with a stop in the land of regional carrier evaluations, and continuing on to what a program that pieces together the best aspects of each geography might look like. Join us for a great trip.

Session Category

Health & Welfare

Credits

CPD: 1.50

Speakers

- 1 . Alan J. Silver WTW
- 2 . Lindsay Lange Lindsay Lange
- 3 . David A. Osterndorf Health Exchange Resources
- 4 . Daniel Joseph Dotzert Conner Strong & Buckelew (Session Assistant)

706 - The Economics and Geopolitics of Aging
October 18, 2023 9:30 AM - 10:45 AM

Demography is reshaping the economic and geopolitical landscape of the 21st century. The United States, along with the rest of the developed world, is entering an era of rapid population aging. Will it also be an era of rising fiscal burdens, chronically slow economic growth, and diminished geopolitical stature? China, the world's "factory floor' for the past twenty-five years, is now hitting its own demographic wall. Can a demographically graying and shrinking China still be an economically and geopolitically rising China? India, which just overtook China as the world's most population country, has more favorable demographics. But can it overcome its many economic handicaps to replace China as the engine of global growth? And what about sub-Saharan Africa, which will account for two-thirds of the growth in the world's working-age population between now and 2050? Speakers explore the implications of these and other global demographic developments for the world economy and world order.

Session Category
: Cross Discipline

Credits
: EA Non-Core: 1.50
: CPD: 1.50

Speakers

- 1 . Thomas S. Terry The Terry Group
- 2 . Richard Jackson Global Aging Institute

707 - Public Plans Workshop
October 18, 2023 9:30 AM - 10:45 AM

This is an open forum on topics of interest to public sector actuaries. The topics are selected by session attendees and may include: funding to surplus; volatility management; impact of higher interest rates on plan design; economic assumptions including ASOP 27; and ASOP 4's low-default-risk obligation measure (LDROM).

Session Category
: Public Plans

Credits

EA Non-Core: 1.50
CPD: 1.50

Speakers

- 1 . Kathleen A. Riley Segal
- 2 . Elizabeth A. Wiley Cheiron, Inc.

708 - ESG Within M&A
October 18, 2023 9:30 AM - 10:45 AM

Speakers address some of the key aspects of mergers and acquisitions affected by the integration of environmental and social governance in decision making.

Session Category

International

Credits

EA Non-Core: 1.50
CPD: 1.50

Speakers

- 1 . James L. Jones EY
- 2 . Sanket Bhimani Ernst & Young, LLP
- 3 . Ketiwe Zipperer Deloitte Consulting LLP

709 - For Long-Term Investing: Bonds or Stocks?
October 18, 2023 9:30 AM - 10:45 AM

Financial economists have long advocated that retirement investing be done using fixed income, given that retirement commitments are generally fixed. This argument relies on a presumption that equity risk increases rather than decreases over time. But -- is this really true? Aren't economies and capital markets cyclical, with at least some reversion-to-mean tendencies? If so, how does that affect the stock vs. bond decision for funding long-term retirement commitments?

Session Category

Investments

Credits

EA Non-Core: 1.50
CPD: 1.50

Speakers

- 1 . R. Evan Inglis Pension Benefit Guaranty Corporation
- 2 . David R. Cantor Mercer
- 3 . Brian C. Donohue October Three LLC

005 - 5 Strategies to Songwriting aka Building Valuable Relationships

October 18, 2023 11:00 AM - 12:30 PM

The 2023 CCA Annual Meeting concludes with the final remarks of the CCA President, the passing of the gavel to the President Elect, and our closing general session where songwriter Jimmy Yeary leads the audience through his 5 strategies. I FEEL, YOU FEEL: Learn the art of valuable connectivity through authentically feeling what you are speaking, to create instant attraction. This is one of the most valuable leadership tools you can possess. BE AUTHENTICALLY VALUABLE: Lead effectively by meeting that intrinsic need we all have to not feel alone and make relatability one of your greatest assets for initiating powerful relationships within the workforce. SELL TO YOURSELF FIRST: Whether you are selling a product or selling yourself, this technique will enable you to see and feel the sale from the buyer's perspective. When this is done, you can guarantee a sales pitch drenched in authenticity. and authenticity creates connectivity. YOU PAINT YOUR BACK DOOR, I'LL SEE MINE: Jimmy will show you how the most trivial details of any life can be precisely the pictures needed to create a desired connection. Through hilarious personal stories, you will see how he uses his life to make you see yours. We connect to emotion, not the specific story. Few people have lost someone in Afghanistan and also drives their truck to remember them, yet millions of people gravitated to one of Jimmy's biggest hits, CMA song of the year, I Drive Your Truck. MONEY WON'T MAKE YOU HAPPY, BUT HAPPY WILL MAKE YOU MONEY: Learn how the power of joy can exponentially improve productivity and hear Jimmy's techniques to tap into happiness more quickly and how to harness it and improve every aspect of your life, in and out of business.

Session Category
: Cross Discipline

Credits
: CPD: 1.50

Speakers

- 1 . Paul M. Sepe WTW
- 2 . Derek N. Guyton
- 3 . David Scharf Buck
- 4 . Jimmy Yeary