CRAMER ROUNDTABLE SERIES

Insurance

05.06.26 | The Westin Nashville

CRAMER & associates

AGENDA*

8:00am	**Opening Remarks & Introductions**	**Rhonda Kulhanek**
8:15am	**From Strategy to Execution** **Discussion Focus:** How leadership is shaping insurance, aligning incentives, and driving advisor accountability. **Be Prepared To:** Share your top-down and bottom-up initiatives, incentives (and consequences) influencing behavior, and how you're integrating insurance across business lines.	**Bill Fryer –** First Citizens **Keith LeBlanc –** Hancock Whitney **Carl Stringfellow –** Regions
9:45am	**Turning Opportunities into Solutions** **Discussion Focus:** How firms identify and act on insurance opportunities–using policy reviews, business valuations, planning, and asset repositioning to drive meaningful conversations. **Be Prepared To:** Share which solutions are gaining traction (SPL, Hybrid LTC, LIRPs, VULs), how you embed policy reviews and business valuations, and how you overcome "bad insurance experience" objections.	**Terri Lachermeier –** Cetera **Jamie Silvestri –** Citizens **Louise Piasecki –** First Citizens
11:10am	**Insurance at The Core of Planning** **Discussion Focus:** Moving insurance from an "add-on" to a natural part of the planning conversation—shifting advisor mindset, driving behavior change, and building training and accountability. **Be Prepared To:** Share how you're positioning insurance within planning, what's changing advisor behavior (and what's not), and how you're reinforcing adoption through training, follow-up, and accountability.	**Vanessa Wilson –** BMO **Terry Bosworth –** Fifth Third **Holley Cary –** First Horizon **Magid Alawad –** Santander
12:00pm	**Lunch**	

***Times may shift based on group engagement.**

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1:00pm	**Data Presentation**	**Todd Nixon**
1:15pm	**Telling the Insurance Story with Data** **Discussion Focus:** How firms define and communicate the right metrics – building reporting that resonates with senior leadership and clearly demonstrates long-term value to the firm, while maintaining front line reporting. **Be Prepared To:** Share which metrics capture leadership's attention (revenue, premium, AUM), how you tell the story beyond activity-based reporting (full book, future value, BUM), and how your reporting drives understanding, engagement, and action.	**Pete Boucher –** HSBC **Don Davenport –** Wells Fargo
2:20pm	**Future-Proofing with AI** **Discussion Focus:** Practical AI use cases you can implement now– and the capabilities you need to build to stay competitive over the next 3–5 years. **Be Prepared To:** Share how you're using AI today, how you'd design an AI-driven insurance program, and what do you believe AI will solve for by 2030.	**Group Breakouts**
3:30pm	**Ask Anyone Anything** **Discussion Focus:** An open, unscripted forum for real-time peer perspectives–addressing challenges, ideas, or lessons learned. **Be Prepared To:** Ask one question you want answered.	**Open Forum**
4:00pm	**Closing Remarks**	**Todd Nixon**

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