



SPRING 2018 NEWSLETTER

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Contact Us:

<http://loma-tc.org>

LOMATwinCities@gmail.com

Spring Seminar

Date: Tuesday, May 8th, 2018

Location:

Catholic United Foundation
3499 Lexington Ave N.

St. Paul, MN 55126

*Free Parking

Cost:

Members: \$25, Non-members: \$35

Program:

7:45 a.m. Registration Opens

8:00 a.m. Breakfast (buffet style)

8:15 a.m. State and National Legislative News

9:00 a.m. Break

9:15 a.m. Financial Services Information Risk Management

10:00 a.m. Break

10:15 a.m. Data Analytics Trends: Big Data, Customer Behavior
and the Data Scientist

11:00 a.m. Break

11:15 a.m. Business Meeting and prize drawings

Menu:

Scrambled Eggs & Cheddar

Sausage Links & Ham Slices

French Toast or Pancakes

Breakfast Potatoes

Charity: Catholic United Foundation

<https://www.catholicunitedfinancial.org/giving/foundation/>

Please register by May 2nd, 2018

Register at: <http://www.loma-tc.org/> or

Send check addressed to LOMA Society Twin Cities to:

Catholic United Foundation

Attn: Cassandra Anderson

3499 Lexington Ave N.

St. Paul, MN 55126



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Spring Seminar Topics and Speakers

State and National Legislative News

Featuring Robin Rowen and Rick Kleven

Robin Rowen is the Executive Director of the Minnesota Insurance and Financial Counsel (MIFSC) and Rick Kleven is the Vice President of Government Affairs at Thrivent Financial. Both spoke last year at our Spring Seminar and we are delighted that they both agreed to come back to give us an update on what has been happening in the legislature this past year.

Financial Services Information Risk Management

Featuring Michael Cashman, Greg Pfeider and Tony Haux

Please join Michael Cashman CEO, Greg Pfeider EVP and Tony Haux CTO/CISO of RiskSmart Advisors for a discussion on the challenging and important topic of protecting confidential data. [The three primary issues to be discussed will be:](#)

1. The importance of ensuring that data is protected from both a legal and financial perspective. This is not just an IT issue.
2. Trusting your vendors to do this for you is not enough; there are vulnerabilities that are less obvious, and you are ultimately responsible.
3. Best practices for methodically organizing your information security landscape.

About RiskSmart Advisors and the speakers:

Founded in 2015 by Michael Cashman, RiskSmart Advisors is a leading risk management software service provider. They have developed unique risk management solutions and tools, leveraging a deep-seeded combination of practical experience, insight into industry best practices and in-depth knowledge of current and planned vendor solutions to help clients achieve their information security goals.

Mr. Cashman has over 30 years in the risk management industry. As CEO and Chairman of E.W. Blanch Company, where after 22 years of facilitating growth he oversaw their successful NYSE IPO. He later served as Vice Chairman of AON Re Worldwide and EVP of AON Corporation, the world's largest insurance brokerage and risk management company.

Greg Pfeider spent the better part of his career on Wall Street, building regional platforms for international investment banks across equity and derivative trading, equity research sales and investment banking. Greg joined RiskSmart in March of 2017 as EVP of Sales and Marketing to build out and market their sales distribution strategy across multiple business verticals.

Tony Haux is seasoned engineer of 36 years in IT having had responsibility to strategize, secure, and mitigate cyber security threats by implementing technology and creating training best practices for private data handling operations. Prior to joining RiskSmart Advisors he held CIO and CTO positions for 8 years at Verifications, Inc., as well as senior technology roles at Honeywell, Pillsbury and Burlington Northern.



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Data Analytics Trends: Big Data, Customer Behavior and the Data Scientist

Featuring Philip Jones

Why is big data analytics important? What is driving insurance companies to use big data? Predictive vs. Behavioral – are they the same or different? Philip will explain how big data helps lead us to smarter business moves, more efficient operations, higher profits and satisfied customers.

Philip A. Jones, Ph.D. is Senior Vice President at Ameriprise Financial, Inc. responsible for leading the Capital Markets Solutions (CMS) group. CMS measures the company's market exposures, recommends market offsets and executes on hedging strategies. These strategies include hedging RiverSource Life Insurance Company Variable Annuity Living Benefits, Indexed Universal Life and Equity Indexed Annuity products as well as other product and corporate exposures.

Prior to joining Ameriprise in 2007, Jones was with GMAC RESCAP, where he was Director of Computational Finance and Risk Management Analytics. Jones was at GMAC for five years and held responsibilities for developing risk management tools to value, analyze and predict behavior of residential mortgages and other asset backed securities. His teams developed platforms allowing for analysis and pricing of securitized and loan asset portfolios at both portfolio and instrument level. Jones began his career at Marsh Financial Services in various analyst, IT and modeling roles. Jones holds a Ph.D. in Mathematics, Concentrations in Probability, Statistics and Algorithms (University of Minnesota), an MA in Mathematics (University of Minnesota) and MA in Mathematics (Oxford University).

Congratulations - New Designees

Last Name	First Name	Company	Date	Designation
Malecha	Karen	Allianz Life Insurance Company of North America	01/03/2018	ALMI
Panek	Christina	Allianz Life Insurance Company of North America	01/12/2018	FLMI Level 1 Certificate
Shaw	Timothy	Allianz Life Insurance Company of North America	01/23/2018	FLMI Level 1 Certificate
Horvath	Kelly	Catholic United Financial	03/10/2018	FLMI Level 1 Certificate
Wells	Roberta	Catholic United Financial	01/27/2018	ACS – Life Insurance
Woods	Kimberly	Catholic United Financial	01/22/2018	ALMI
Bandeira	Jennifer	Direct Response Insurance Administrative Services, Inc.	02/16/2018	FLMI Level 1 Certificate
Kim	Minsu	New York Life	03/11/2018	ACS – Life Insurance
Carlson	Emily	Prudential	01/12/2018	FLMI Level 1 Certificate
Eskuchen	Kris	Prudential	03/23/2018	FLMI Level 1 Certificate



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Hickey	Ryan	Prudential	02/16/2018	ACS – Life Insurance
Martinovic	Grace	Prudential	01/18/2018	ACS – Life Insurance
Moran	Paul	Prudential	01/08/2018	FLMI Level 1 Certificate
Blank	Chad	ReliaStar Life Insurance Company	02/15/2018	ARA
Bhasin	Aditya	Securian Financial Group	03/01/2018	FLMI Level 1 Certificate
Ecklund	Emily	Securian Financial Group	01/24/2018	FLMI Level 1 Certificate
Frederiksen	Justin	Securian Financial Group	03/15/2018	ALMI
Gooley	Adam	Securian Financial Group	01/03/2018	ASRI
Haas	Emily	Securian Financial Group	01/27/2018	FSRI Level 1 Certificate
Hapip	Benjamin	Securian Financial Group	01/07/2018	FLMI Level 1 Certificate
Hargens	James	Securian Financial Group	03/02/2018	FLMI Level 1 Certificate
Herman	Bridget	Securian Financial Group	01/09/2018	ALMI
Hirsch	Nicholas	Securian Financial Group	03/02/2018	ALMI
Johnson	Kristina	Securian Financial Group	02/23/2018	ALMI
Johnson	Michelle	Securian Financial Group	01/23/2018	ACS – Life Insurance
Kivi	Jennifer	Securian Financial Group	02/07/2018	ACS – Life Insurance
Knoke	Clayton	Securian Financial Group	02/18/2018	ALMI
Knoke	Clayton	Securian Financial Group	01/24/2018	FLMI Level 1 Certificate
Krone	Brittany	Securian Financial Group	01/08/2018	ALMI
Mistelske	Lauren	Securian Financial Group	03/03/2018	FLMI Level 1 Certificate
Most	Micah	Securian Financial Group	02/11/2018	FLMI Level 1 Certificate
Murray	Tracy	Securian Financial Group	03/02/2018	FLMI Level 1 Certificate
Ochoa	Marta	Securian Financial Group	03/30/2018	FLMI Level 1 Certificate
Pasch	Brenna	Securian Financial Group	03/07/2018	FLMI Level 1 Certificate
Santella	Gina	Securian Financial Group	02/04/2018	FLMI Level 1 Certificate
Strain	Sarah	Securian Financial Group	01/27/2018	FLMI Level 1 Certificate
Tauer	Johnathan	Securian Financial Group	03/19/2018	FLMI Level 1 Certificate
Trisko	Amy	Securian Financial Group	01/05/2018	FLMI Level 1 Certificate
Turner	Jaron	Securian Financial Group	01/16/2018	FLMI Level 1 Certificate
Zurn	Katelyn	Securian Financial Group	01/09/2018	FLMI Level 1 Certificate
Musai	Amit	TATA Consultancy Services	04/02/2018	ACS – Life Insurance
Saylor	Dena Marie	Thrivent Financial for Lutherans	01/31/2018	FLMI Level 1 Certificate



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Winter Meeting Recap

Featuring Social Media: Trends, Best Practices and Uses.

LOMA Society of the Twin Cities held its winter meeting on February 27 at the Ramada Plaza in Minneapolis, a favorite because it is more central to both cities. After each event, we ask members to complete a survey. Our members confirmed they want to hear more about trending industry topics. We selected Social Media with a focus on how it is used in the workplace.

Following a delicious dinner of three choices, Society President Katherine Stickler welcomed the attendees to the event and went over society business. Paul Lindemann, Society Vice President introduced our keynote speaker, D.J. Hamm.



D.J. Hamm, Social Media Lead at Securian Financial Group had some astounding statistics for us. We watched a great video on Socialnomics and learned:

- Over 50% of the world population is under 30 years old
- Today's college students have never licked a postage stamp
- 53% of millennials would rather lose their sense of smell than their technology
- Social Media = relationships



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- 93% of buying decisions are influenced by social media
- This year video will account for over 2/3 of mobile usage
- Shrinking attention spans – goldfish, 8 seconds; humans 7 seconds
- 1 in 3 marriages start online and last
- The fastest growing demographic on Twitter is grandparents
- Every second 2 people join LinkedIn

D.J noted there are 2.5 Billion active users on social media with an estimated growth to 3 billion in 2021; that's 1/3 of the world population. Facebook leads with 2.07 billion monthly active users; a steady increase in the last 10 years. What are the others? Instagram, Twitter, LinkedIn, Pinterest and Snapchat are also growing steadily.

Charity – Senior Linkage Line

At each meeting the LOMA Society selects a charity to which members may contribute. At the winter meeting the sponsored charity was [Senior Linkage Line](#). This is a free service offered by the State of Minnesota which provides resources for older adults and their families to find community services or plan for their future. Call or chat with a representative about Medicare options, how to pay for prescription drugs and housing transition options.

Announcing our Winners!

Charity drawing

\$25 Gift Certificate to our host venue, Ramada Plaza

Congratulations – Dixie Carroll

Survey drawing

\$10 Gift Certificate – Target

Congratulations – Dawn Miller



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Connecting with Our Members

In January, the communications committee sent out a six question survey to our company and educational reps asking how we can better connect with them and members at their companies. Some requested we provide them news and event information and they will pass it along, others asked that we email members directly. We also asked about their preferred method of payment and if there would be any interest for members to attend virtually through a live connection at future events. Within the last year we've added the ability to register for events using Paypal which seems to be well received by both individuals attending and reps signing up a large group. We continue to strive to improve our communication to all and welcome any feedback you have. Please send comments or questions to lomatwincities@gmail.com

2018 Board Nominations

The Nominating Committee of the LOMA Society of the Twin Cities is looking for board members...

Current Board Members:

President – Kathy Stickler

Vice-President –Paul Lindemann

Secretary – LuAnn Maxfield

Treasurer –Cassandra Anderson

Society Representative- Vacant

Members at Large – Dawn Miller, Lisa Quam, Jared Assay, Jesse Cregan and Laura Gerde