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Monday, February 26, 2018

7:00 AM - 5:30 PM	Registration Desk Open
7:30 AM - 8:30 AM	Networking Breakfast
8:45 AM - 9:00 AM	Opening General Session Speakers: Darwin Bayston , James W. Maxson
9:00 AM - 10:00 AM	State of the Life Insurance Market: Implications for Future Secondary and Tertiary Markets The financial and economic conditions of the primary life insurance market have a profound impact on the health and activity of the secondary and tertiary markets. This session will review the state of the life insurance industry from the macro environment to carrier considerations and look forward to factors that will impact secondary and tertiary market activity. Speakers: Colin Devine
10:00 AM - 10:30 AM	Networking Break
10:30 AM - 11:30 AM	Building a Portfolio: Evaluating COI Risk Improving carrier diversification is one method portfolio managers employ to manage risk and enhance acquisition analysis. This panel will discuss investor techniques, including machine learning applications, to fine tune carrier-specific and product-specific risks. Analysis will focus on trends and patterns that indicate the likelihood of COI (cost of insurance) increase in carriers' existing books of business, and its relationship to longevity risk from investors' perspective. Speakers: Matthew Sheridan , Mark Venn
11:30 AM - 12:30 PM	The Supply-Side Growth in life settlement transaction volumes suggest new capital commitments continue as investors seek above average returns in this low interest rate environment through life settlement investment. This panel will review the current supply-side market conditions, and look into the near and long term future of the tertiary, secondary and burgeoning direct markets. Speakers: Jeffrey Bollerman , Jay Jackson
12:30 PM - 1:30 PM	Networking Luncheon
1:30 PM - 2:15 PM	Federal Tax Provision Changes The recently passed 2017 Tax Cuts and Jobs Act contains provisions that change the way secondary life policy owners are taxed on the sale of their policy. The changes provide a significant benefit to the consumers and should increase the policy submissions for the life settlement market. The session will discuss the effects of the changes and provide the latest update on the specifics of details related to reporting and other issues. Speakers: James W. Maxson , Thomas Weinberger
2:15 PM - 3:00 PM	Investment Performance Performance and reporting standards are becoming very important to the life settlement industry. Every other asset class: equities, fixed income, real estate, derivatives, and private equity has Investment performance and reporting standards to measure and illustrate returns. This panel will discuss the issues surrounding establishing a set of performance standards for life settlements. Speakers: Bill Corry , Dan Young

Moderator: [Darwin Bayston](#)

3:00 PM - 3:30 PM

Networking Break

3:30 PM - 4:30 PM

Life Expectancy: Tradition Plus Innovation in the Quest for Improved Underwriting

Traditional life expectancy and mortality methods are advancing with innovations resulting from longevity research and predictive algorithms in the quest for improved and more precise underwriting. This session will discuss some of the new innovations and their use by secondary and tertiary market participants.

Speakers: [S. Jay Olshansky Ph.D.](#)

4:30 PM - 5:30 PM

Insurtech is Changing the Traditional Model of Life Insurance & Will Impact the Settlement Industry

Financial technology is forcing insurance companies to rethink their traditional models, given technologies such as artificial intelligence, blockchain and other digital touch points that offer convenience and efficiency. This session will address how these changes will impact the secondary and tertiary markets.

Speakers: [Anthony Tempesta](#)

5:30 PM - 7:00 PM

Networking Reception

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