

# *Finance, Management & Operations*

## **LTC CFO Round Table**

Loretta Jacobs, Vice President, Bankers Life

Shawna Meyer, LTC CFO, New York Life

Julianne Sorice, CFO, LifeCare Assurance



**16th Annual Intercompany Long Term Care Insurance Conference**

# LTC CFO Round Table Panel Introductions



- Personal Background
- Outline of LTC business at your company
  - Closed vs. open block
  - Size (annualized premium, policy count, reserves)
  - Group vs. Individual
  - LTC organizational structure and alignment
- Philosophy of LTC management at your company
  - Panelist's role in LTC profit/(loss) management
  - Key management goals for the line
  - Key stakeholders

# LTC CFO Round Table Discussion Topics



- Actuarial Assumption Risk
- Claims Experience and Administration Capabilities
- Premium Rate Increases
- Earnings Volatility
- Closed vs. Open Blocks
- New Product Development
- Capital Management
- Looking forward.....