Insurer Investment Forum XVII
Sponsorship Opportunities Overview

March 30-31, 2017
Park Hyatt Aviara Resort
Carlsbad, CA

STRATEGIC ASSET ALLIANCE

THE INSURANCE INVESTMENT SPECIALIST

11 Bellwether Way, Suite 209, Bellingham, WA 98225 (360) 255-2500 Fax (360)-734-2049

STRATEGIC ASSET ALLIANCE
THE INSURANCE INVESTMENT SPECIALIST

YOU ARE INVITED TO SPONSOR THE INSURER INVESTMENT FORUM XVII

For the 17th consecutive year, Strategic Asset Alliance will hold its annual Insurer Investment Forum, where CEOs, CFOs and CIOs from life/health, property/casualty and reinsurers will come together to discuss important investment issues. This is the longest running investment conference for insurers of all types.

We are inviting a few select firms to be a sponsor at this most unique event, as that is **the only manner in which investment management firms are invited to attend.** Sponsorships are limited in number, but can have unlimited benefits for your firm. You are invited to take advantage of the Gold and Silver Sponsorships.

Unlike other industry conferences, the Insurer Investment Forum is known for its emphasis on developing and encouraging conversations amongst attendees. With that in mind, **we limit attendance to fifty.**

The upcoming IIF XVII will be held at the Park Hyatt Aviara Resort from March 30-31, 2017.

Importantly, the **Gold Sponsorship is limited to three firms**. Gold Sponsors receive a one-hour solo speaking slot during one of the "**Investment Strategies in an Unprecedented Economic Environment**" sessions.

Ample time is allocated for all attendees to meet each other during meals, breaks and during optional resort activities.

Please note there is a significant discount if we receive payment by November 17, 2016. Several firms have already indicated a strong interest in participating.

I know you will find this year's Insurer Investment Forum to be productive as well as enjoyable. We look forward to having you join us as a sponsor of this extraordinary event.

To apply or inquire about our sponsorships, contact Eriver Eugenio at eeugenio@saai.com or 360-255-2500 ext. 102.

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SPONSORSHIP OPPORTUNITIES

Sponsorship Availability Limited to: Gold = 3 Silver = 5

Gold Level Benefits

- One-hour solo speaking spot, addressing:
  "**Investment Strategies in an Unprecedented Economic Environment**"
- Two guest passes for Sponsor employees to conference (One Speaker + One Additional Pass)
- One guest pass for an unaffiliated insurer you designate
- Recognition as a sponsor on all advertising for the conference
- Link to sponsor website on Insurer Investment Forum XVII home page
- Attendee e-mail list two weeks before and after the conference, by request
- Participation in follow-up activities:
  - Distribution of Presentation materials via InsurerCIO
  - Solo Speaking Slot in "**Investment Perspectives**" Follow-Up Webinar
  - Solo Insurer Investment Perspectives **Q&A Sheet** (If Applicable)
  - **Lead Generation** for all post-conference materials, showing who downloaded your firm's resources

Sponsorship Committment Level: $16,000*

Silver Level Benefits

- One guest pass for Sponsor employees to conference
- One guest pass for an unaffiliated insurer you designate
- Recognition as a sponsor on all advertising for the conference
- Link to sponsor website on Insurer Investment Forum XVII home page
- Attendee e-mail list two weeks before and after the conference, by request

Sponsorship Committment Level: $9,000*

***10% Discount Will Apply If Full Payment Received by November 17, 2016**

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BENEFITS OVERVIEW

Guest Passes

At this most unique event, being a sponsor is the only manner in which investment management firms are invited to attend. Sponsors may invite an unaffiliated (neither a client of the sponsoring firm nor SAA) insurer CEO/CFO/CIO guest to this invitation-only event. After SAA's approval of this guest, they will be provided with a code to waive the registration fee.

Solo Speaking Slot

Gold level sponsors are provided a one-hour solo speaking slot addressing, "Investment Strategies in an Unprecedented Economic Environment." The speaking topic of all Gold level sponsors is subject to Strategic Asset Alliance approval.

Following the conference, an "**Investment Perspectives from the Insurer Investment Forum**" webinar will be held for insurers and/or firms who were unable to attend the conference. Gold level sponsors who speak at the conference will also be provided a speaking slot during this webinar to provide a recap and update to an extended audience.

Watch Last Year's Webinar

Q&A Sheet

The "Investment Perspectives from the Insurer Investment Forum" webinar will conclude with a Q&A session (pending sufficient questions from the audience). As Gold level sponsors will be providing answers live on the webinar, SAA will transcribe the session into a Q&A sheet for each individual Gold level sponsor.

Lead Generation

Once the conference has concluded, all materials developed in relation to the Forum will be made readily available for both attendees and non-attendees via InsurerCIO. While all materials are free of charge, we do ask that those downloading forum content complete a form highlighting key information (i.e. name, company name, ect.).

Gold sponsors will receive download data for the conference presentations, Q&A sheet and webinar.

Use of Conference Mailing List

Sponsors will be able to receive an informative list of the attendees registered for the conference two weeks before and two weeks after the conclusion of the event.

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SPONSORSHIP AGREEMENT

Company: _____

Contact: _____

Phone: _____ Fax: _____ E-mail: _____

Address: _____

City: _____ State: _____ Zip: _____

We would like to participate as a Sponsor for the Insurer Investment Forum XVII.

Please accept our application to be a:

_____ GOLD SPONSOR: $16,000

_____ SILVER SPONSOR: $9,000

10% Discount Will Apply If Full Payment Received by November 17, 2016

TERMS OF AGREEMENT

Strategic Asset Alliance will furnish our firm with the sponsorship rights and amenities according to the sponsorship package we've selected. Our firm understands that it will receive no other preference in any other business dealings with Strategic Asset Alliance, InsurerCIO or any other affiliate.

I agree with the above terms and conditions.

_____

Authorized Signature **Date**

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LAST YEAR'S AGENDA

Wednesday, March 2:

7:30 am **Breakfast Buffet**

8:30 am **SAA Investment Workshop**

Join your peers in discussions of case studies based upon real experience of SAA working closely with clients. Review different investment approaches from both the Board and senior management perspectives. Last yer's case studies addressed: Asset Allocation, "Best Practices" Investment Policies, Investment Manager Search and Benchmarking..

12:00 pm **Lunch**

6:00 pm **Welcome Reception & Dinner**

Thursday, March 3:

7:30 am **Breakfast Buffet**

8:30 am **Welcome and Opening Remarks:**
Michael C. Koetters, Managing Director, Strategic Asset Alliance

8:45 am **Taming Surplus Volatility**
Alton Cogert, President & CEO, Strategic Asset Alliance

Calm financial markets have recently given way to deep uncertainties. We enter the year in the 'fear' part of the fear/greed cycle and that can raise questions about the investment process, all the way up to the Board level. How are insurers positioned for low interest rates plus surplus volatility? What are the 'best practices' for taming surplus volatility? Given the current environment, what investment classes can bring improved risk adjusted portfolio returns?

9:30 am **The Case of the Strangely Volatile Surplus**

Moderators: Alton Cogert, President & CEO
Daniel Smereck, Managing Director
John Mohr, Managing Director

In this role playing activity, you will have the opportunity to be a Board of Directors or senior management member of an insurer grappling with today's market turbulence and its unexpected effects on your company's surplus. What can you learn from this interesting, unusual, yet perhaps very applicable situation for your company?

10:45 am **Break**

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INSURER INVESTMENT FORUM XIV AGENDA (CONTINUED...)

11:00 am **Successful Portfolio Strategies in a Changing Global Environment – Part I**

Global central banks are now the movers and shakers of financial markets to an extent never before seen. While the Fed goes in one direction, the central banks in Europe, Japan and China go another. Considering this environment as well as 'low rates for longer', three well-regarded investment management firms will recommend and discuss appropriate investment strategies. Compare and contrast these strategies with the approach utilized at your insurer.

"Global Opportunities that Complement US Core Bond Strategies"
Laura Lake, Senior Portfolio Manager, Standish Mellon Asset Management

Many institutional investors have a structural allocation to high quality fixed income and are questioning expected returns in U.S. investment grade rated bonds. Moving to a global approach can offer a number of benefits. The structural advantages of a global approach are further accentuated by an environment where the U.S. Federal Reserve is tightening policy while many other developed market central banks continue on an easy monetary policy path. Increased divergence within central bank policy globally can provide a rich bac drop of opportunities for active, tactical managers to deliver strong risk adjusted returns.

12:00 pm **Lunch**

1:30 pm **Successful Portfolio Strategies in a Changing Global Environment – Part II**

"Opportunities in Private Securities: The Potential for Additional Yield, Diversification and Control through Private Placements and Private Real Estate Debt"
Jack Maher, Managing Director - Head of Alternatives, HIMCO

Today's search for yield is pushing many investors further out on the risk-return curve – and further away from their comfort zones, especially in light of a market environment that suggests both potential interest rate hikes and greater volatility. One area investors may wish to consider is private asset classes such as private placement debt and commercial real estate mortgage loans. Private markets do demand greater investor scrutiny and an understanding of liquidity risks, but they may also offer investors another avenue to pursue yield in time-tested asset classes.

2:30 pm **Break**

2:45 pm **Successful Portfolio Strategies in a Changing Global Environment – Part III**

"Ways for Mitigating Currency Risk When Evaluating International Equity Allocations"
Christopher Gannatti, Associate Director of Research, WisdomTree Asset Management

We are seeing continued institutional focus on the topic of currency hedging as the US dollar remains strong and the FED is poised to raise rates again in 2016.

3:45 pm **Break**

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INSURER INVESTMENT FORUM XIV AGENDA (CONTINUED...)

4:00 pm **Face the Forum: An Open Discussion**
Alton Cogert, President & CEO, Strategic Asset Alliance
Daniel Smereck, Managing Director, Strategic Asset Alliance
John Mohr, Managing Director, Strategic Asset Alliance
Michael Koetters, Managing Director, Strategic Asset Alliance

The capstone session of the Insurer Investment Forum provides an opportunity to review some of the key concepts and issues raised during the Forum and over the past year. How have these issues been addressed in various situations? What new issues does SAA believe will be of importance in the coming year? How can your company be proactive in addressing these issues? It also provides an excellent opportunity for you to ask questions of SAA's Principals and get their thoughts on important topics and strategies, whether or not previously discussed during the Forum. This session promises to be lively, as you will undoubtedly get slightly different perspectives from different SAA Principals.

4:45 pm **Adjourn**

5:00 pm **Farewell Reception**

Friday, March 4:

8:30 am **Optional Golf**

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REPRESENTATIVE LIST OF PAST INSURERS ATTENDEES

AAA Life Insurance Company
AAA Northern California, Nevada and Utah
Aegis Insurance Services, Inc.
AEGON
Alaska Municipal League Joint Insurance Association
AmCOMP Preferred Insurance Company
American Enterprise Mutual Holding Company
American Fidelity Assurance Company
American Republic Insurance Company
American Savings Life Insurance
Amerisafe Group
Anthem
Arch Insurance Group, Inc.
Assurity Life Insurance Company
Assurity Security Group Inc
Auto Club Inter-Insurance Exchange
Auto-Owners Insurance
Aviva USA
Balboa Insurance Group
BETA Healthcare Group
Black Diamond Risk Enterprises
Blue Cross Blue Shield of FL
Blue Cross Blue Shield of Tennessee
Brotherhood Mutual Insurance
C.L. Frates and Company Insurance Agency
CalCPA ProtectPlus
California Casualty Indemnity Exchange
California Casualty Management Company
California State Automobile Association
California State Automobile Association
CAMICO Mutual Insurance Company
Canal Insurance Company
Capital District Physicians' Health Plan
Caterpillar Insurance Company
Catholic Order of Foresters
Colorado Public Employees Retirement Association
Columbian Mutual Life Insurance
Community Hospital Alternative for Risk Transfer
Community Hospital Alternative for Risk Transfer
Connecticut Interlocal Risk Management Agency
County Employee Benefits Consortium of Ohio

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REPRESENTATIVE LIST OF PAST INSURERS ATTENDEES (CONTINUED...)

County Reinsurance, Limited
County Risk Sharing Authority of Ohio
Driveline
El Monte City School District
EMC Insurance Companies
Farm Bureau Life Ins. Co. of Michigan
Fidelity Life Association
Georgia Interlocal Risk Management Agency
Georgia Municipal Association
Gerber Life Insurance Company
Gerling Global Reinsurance Corporation of America
Government Entities Mutual
Grange Mutual Casualty Company
Grinnell Mutual Reinsurance
Guarantee Trust Life Insurance Company
Hannover Life Reassurance Co of America
Harleysville Insurance
Hartford Steam Boiler
Hastings Mutual Insurance Co.
HCC Insurance Holdings, Inc.
HSB Group, Inc.
ICI Mutual Insurance Company
Indiana Farm Bureau Ins
ING Insurance
Interlock Industries
Kansas City Life Insurance Company
Life Insurance Company of Alabama
Lincoln Heritage Life Insurance Co.
Lynn Insurance Group
Massachusetts Interlocal Insurance Association
Meadowbrook Ins. Group
Merchants Insurance Group
Met Life
MHA Insurance Company
MICA Insurance
Michigan Millers Mutual Insurance
Midwest Medical Insurance Co
Mutual Ins Co. of Arizona
Mutual Protective Insurance
National Western Life Ins.
Navigators Insurance Group

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REPRESENTATIVE LIST OF PAST INSURERS ATTENDEES (CONTINUED...)

Nebraska Investment Council
NetCare Life and Health Insurance Company
Nevada POOL/PACT
NLC Mutual Insurance Company
NORCAL Mutual Insurance Company
Nuclear Electric Insurance Limited
Pacific Guardian Life Insurance Company
Pacific Life Insurance Company
Pacificare Life & Health Ins Co.
Paratransit Insurance
PEMCO Mutual Insurance Company
Physicians Mutual Insurance
Pinnacol Insurance
PMI Mortgage Insurance
Pro Mutual Group
Prudential Financial
Public Compensation Mutual
RLI Insurance
Safeco Insurance Companies
Savings Bank Life Ins. of N.Y.
SCF Arizona
Scottish Re
Sentry Insurance
Texas Association of School Boards
Texas Mutual Insurance Company
The Dentists Insurance Company
The New York Black Car Fund
The Standard
The Warranty Group
Trustmark Insurance
United Educators Insurance, a RRRG
UNUM Group
UnumProvident
Utah Business Insurance Company
Utica Mutual Insurance Company
Vanliner Insurance Company
Vermont League of Cities and Towns
West Bend Mutual Insurance Company
Western & Southern Life Insurance Co.
Westfield Group
Workers Compensation Fund