

Insurer Investment Forum XXIII (2023) Sponsorship Opportunities Overview

March 29 – 30, 2023
The Ritz-Carlton, Dove Mountain
Marana, AZ



15000 N Secret Springs Dr.
Marana, AZ, 85658
(40 Minutes from Tucson | 90 Minutes from Phoenix)



STRATEGIC ASSET ALLIANCE
THE INSURANCE INVESTMENT SPECIALIST



You're Invited to Sponsor the Insurer Investment Forum XXIII

For the 23rd consecutive year, Strategic Asset Alliance will host its annual Insurer Investment Forum, where CEOs, CFOs and CIOs from Life, Health and P&C insurers, Gov't Risk Pools and reinsurers come together to discuss important investment issues. This is the longest running investment conference for insurers of all types.

We are inviting select firms to sponsor this unique event; sponsorships are the only manner investment management firms are invited to attend. Sponsorships are limited in number but can have unlimited benefits for your firm.

Unlike other industry conferences, the Insurer Investment Forum is known for its emphasis on developing and encouraging conversation amongst attendees. Sponsors tell us they enjoy meeting and getting to know all attendees in both a business and casual setting. With that in mind, **we limit total attendance to fifty.**

The IIF XXIII will be held at **The Ritz-Carlton, Dove Martin** on **March 29 - 30, 2023.**

The Gold Sponsorship is limited to three firms. Gold Sponsors receive a 45-minute solo speaking slot, along with participation as a panelist in a 45-minute "Ask the Experts" Q&A session with the other Gold Sponsors.

Several firms and previous sponsors have already indicated a strong interest in participating. Please note there is a significant discount if we receive payment by November 22, 2022.

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.

SAA may decline a sponsorship application due to potential conflict of interest, capacity, or other related reasoning. If deemed necessary by SAA, adjustments to the agenda and setting will be made to enhance the safety of all attendees.





Sponsorship Availability:

Gold = 3 | Silver = 6

***10% Discount Will Apply if Full Payment Received by Nov. 22, 2022**

Gold Level Benefits:

- 45-Minute Solo Speaking Slot, Addressing the Conference Theme (*Determined at a Later Date*)
- Participation in a 45-Minute “Ask the Experts” Q&A Panel
 - Panel will consist of the 3 Gold Sponsors
 - SAA’s Principals will moderate
- Two (2) Representatives from Your Firm Can Attend
 - One registration for your firm’s speaker | An Additional Registration
- One (1) Guest Pass for an unaffiliated insurer or government risk pool you designate
- Recognition as a sponsor on all conference advertising
- Attendee e-mail list two weeks before and after the conference
- Participation in follow-up activities, post-conference:
 - Distribution of Presentation Materials
 - Q&A Interview (*optional*)

Sponsorship Commitment Level:

\$20,000*

Silver Level Benefits:

- One (1) Representatives from Your Firm Can Attend
- One (1) Guest Pass for an unaffiliated insurer or government risk pool you designate
- Recognition as a sponsor on all conference advertising
- Attendee e-mail list two weeks before and after the conference
- Participation in post-conference Q&A Interview (*optional*)

Sponsorship Commitment Level:

\$12,500*





STRATEGIC ASSET ALLIANCE
THE INSURANCE INVESTMENT SPECIALIST

Sponsorship Agreement

Company: _____

Name: _____

Phone: _____ E-mail: _____

Address: _____

City: _____ State: _____ Zip: _____

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

Please accept our application to be a:

_____ **Gold Sponsor: \$20,000**

_____ **Silver Sponsor: \$12,500**

***10% Discount Will Apply If Full Payment Received by Nov. 22, 2022**

Invoice can be provided after agreement has been submitted, upon request

Terms of Agreement

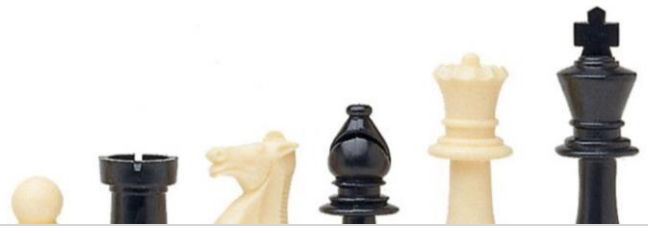
Strategic Asset Alliance (SAA) will furnish our firm with the sponsorship rights and amenities according to the sponsorship package we've selected. Our firm understands these amenities and other conference details may change due to unforeseen circumstances. Our firm understands that it will receive no other preference in any other business dealings with Strategic Asset Alliance, SAA Advisors, InsurerCIO or any other affiliate. SAA may decline a sponsorship application due to potential conflict of interest, capacity, or other related reasoning.

I agree with the above terms and conditions.

Authorized Signature

Date





Past Attendees

AAA Life Insurance Company
AAA Northern California, Nevada and Utah
Aegis Insurance Services, Inc.
AEGON
Alaska Municipal League Joint Insurance Assoc.
AmCOMP Preferred Insurance Co.
American Enterprise Mutual Holding Co.
American Fidelity Assurance Company
American Republic Insurance Company
American Savings Life
American Savings Life Insurance
Amerisafe Group
AMICA Mutual Insurance Co.
Anthem
Arch Insurance Group, Inc.
Association of Gov't Risk Pools
Assurity Life Insurance Company
Assurity Security Group Inc
Auto Club Inter-Insurance Exchange
Auto-Owners Insurance
Aviva USA
Balboa Insurance Group
BCBS of AZ
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 Health
California Casualty Indemnity Exchange
California Casualty Management Company
California State Automobile Association
CAMICO Mutual Insurance Company
Canal Insurance Company
Capital District Physicians' Health Plan
Caterpillar Insurance Company
Catholic Order of Foresters
Centene/Health Net, Inc.
Colorado Public Employees Retirement Assoc.
Columbian Mutual Life Insurance
Community Hospital Alternative for Risk Transfer
Connecticut Interlocal Risk Management Agency
County Employee Benefits Consortium of OH
County Reinsurance, Limited
County Risk Sharing Authority of Ohio
Delaware Valley Trusts

Driveline
El Monte City School District
ELCO Mutual Life and Annuity
EMC Insurance Companies
Farm Bureau Life Ins. Co. of Michigan
FFVA Mutual
Fidelity Life Association
First Protective Insurance
First Trinity Financial Corp.
Georgia Interlocal Risk Management Agency
Georgia Municipal Association
Gerber Life Insurance Company
Gerling Global Reinsurance Corp. 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
League of Minnesota Cities
Lexon Surety Group, LLC
Life Insurance Company of Alabama
Lincoln Heritage Life Insurance Co.
Lynn Insurance Group
Massachusetts Interlocal Insurance Assoc.
Meadowbrook Ins. Group
Merchants Insurance Group
Mercury Insurance
Met Life
MHA Insurance Company
MICA Insurance
Michigan Millers Mutual Insurance
Midwest Medical Insurance Co.
Montana Municipal Insurance Authority
Mutual Ins Co. of Arizona
Mutual of Omaha
Mutual Protective Insurance
National Western Life Ins.

Navigators Insurance Group
Nebraska Investment Council
NetCare Life and Health Insurance Co.
Nevada POOL/PACT
NLC Mutual Insurance Company
NORCAL Mutual Insurance Company
North Carolina League of Municipalities
Nuclear Electric Insurance Limited
Pacific Guardian Life Insurance Co.
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
State Compensation Insurance Fund
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
UHA Health
United Educators Insurance
UNUM Group
UnumProvident
Utah Business Insurance Company
Utica Mutual Insurance Company
Vanliner Insurance Company
Vermont League of Cities and Towns
Washington Cities Insurance Authority
West Bend Mutual Insurance Co.
Western & Southern Life Insurance Co.
Westfield Group
Workers Compensation Fund
World Insurance Co.





Sample Agenda: 2022 Insurer Investment Forum

Wednesday, March 23:

8:00 am **Breakfast**

9:00 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.

Noon **Lunch**

1:30 pm **Investment Seminar for Government Risk Pools**

Only at this special Investment Seminar are the most important investment issues facing pools discussed and dissected in detail. Using a case study format, everyone can ask questions and contribute their experience to the mutual knowledge of all pools at this seminar. As the investing and economic landscapes grow more complex, it is more important than ever to find out how your pool can improve its investment process.

4:30 pm **Adjourn**

6:00 pm **Reception and Dinner**

Thursday, March 24:

8:00 am **Breakfast**

9:00 am **Welcome and Opening Remarks**

It's a Sci-Fi World

Alton Cogert, President & CEO, Strategic Asset Alliance

About a decade ago, the Insurer Investment Forum's theme was "The Times They Are A-Changing." Little did we know that was an understatement. The world is going through accelerated change in many areas of our life. And, many of those changes are represented in our investment portfolios. In an industry known for its conservative nature, how can your insurer or government risk pool be aware and ready for change in its investment portfolio?



Sample Agenda: 2022 Insurer Investment Forum

- 9:45 am **Digital Assets – Evolution or Revolution? – An Insurance CIO’s Perspective**
Nico Santini, Senior Vice President, Chief Investment Officer, ProSight Specialty Insurance
- Who hasn’t heard about so-called cryptocurrencies and wondered about them? Can they be used as a currency of some sort? Could they be a store of value and a possible investment choice? What’s the difference between Bitcoin, Ethereum and those thousands of other crypto coins? And, what about decentralized finance, often called DeFi? Will this ultimately change how we do business? Hear from a highly regarded insurer CIO on how he is viewing this and how these areas should be approached.
- 10:45 am **Break**
- 11:00 am **Most Important Insurer Investment Problems and Potential Solutions**
Daniel Smereck, Managing Director, Strategic Asset Alliance
Nathan Simon, Director, Strategic Asset Alliance
- With any luck, we are approaching the land of post-COVID. But, with what kind of challenges has that land left us? Repressively low interest rates and spreads. Inflation. Historically high equity valuations. Uncertainties surrounding work from home versus office. With regulators trying to catch up. What are the most important investment problems coming from this for insurers? How are SAA’s clients addressing these problems? What does SAA see coming ‘over the horizon’ that insurers should be ready for today?
- Noon **Lunch**
- 1:30 pm **It’s a Sci-Fi World**
Let’s apply what we’ve discussed about today’s Sci-Fi World to what this means for specific asset allocation and investment decisions. In the following sessions, three highly regarded investment managers will step back and take a big picture look at the investment arena. Some of their ideas and recommendations will have a short-term time frame (after all, the sci-fi world is happening now) and some will have a medium- or longer-term time frame. In either event, we would be well served to listen carefully and question what they tell us.
- Managing Investments and Risk Through Technological Change**
Vin Delucia, CIO, New England Asset Management
Technology will continue to evolve rapidly as human ingenuity utilizes new technologies to create the “next big thing”. The basic laws of investing, however, will always apply. Today, we’ll briefly touch on some technological, environmental, and regulatory changes on the horizon. We’ll provide our views on topics from 5G to ESG and what the implications are for investors, both today and in the future.



Sample Agenda: 2022 Insurer Investment Forum

- 2:15 pm **Blending Public & Private Credit for Enhanced Yield**
Michael R. Smith, Managing Director, Muzinich & Co.
Private credit has increased dramatically in popularity amongst insurers and other institutional investors as yields within the public markets have declined. Equally, the narrative around why private credit is here to stay remains compelling: Banks have retreated from lending and private credit has filled the much needed void. But what about liquidity? Is there a way to blend public and private credit to allow insurers the benefit from Public Credit liquidity and the yield enhancement of Private Credit? How would that look and what could yield expectations be?
- 3:00 pm **Break**
- 3:15 pm **Uncovering Private Credit Opportunities for Insurers**
Ken Kencel, President & CEO, Churchill Asset Management
2021 was a banner year for private credit, with combined syndicated and direct loans setting a record of \$228 billion. While this was partly driven by the unleashing of pent-up demand from issuers and investors, it can also be attributed to the virtues of the asset class highlighted through COVID-19: higher yields, less correlation and lower defaults (versus comparable public market asset classes). Will these benefits hold for 2022? What questions should insurers be asking as they consider allocations?
- 4:00 pm **Ask the Experts**
Panelists:
Vin Delucia, CIO, New England Asset Management
Ken Kencel, President & CEO, Churchill Asset Management
Michael R. Smith, Managing Director, Muzinich & CO.

Moderator: Alton Cogert, Strategic Asset Alliance

In this fast paced, free-for-all session, we place all three investment manager presenters, as well as SAA, on the 'hot seat' about any question that may have arisen at the conference. We suspect, given the variety of opinions, that this will be one of the livelier sessions.
- 4:45 pm **Adjourn**
- 5:00 pm **Farewell Reception**