

INSURER INVESTMENT FORUM XXIV

March 20 - 21, 2024

Fairmont Scottsdale Princess

Scottsdale, AZ

Wednesday, March 20:

8:00 am **Breakfast Buffet**

9:00 am **SAA's Insurer Investment Workshop**

Join your peers in a discussion of case studies based on SAA's experience in working closely with insurance clients. SAA's Principals will lead attendees in conducting, and then comparing, asset allocation decisions from both strategic and tactical 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.

Guest Presenter: Dubravka Romano, Principal, Romano Strategy Advisors

Drawing from her vast experience in risk pooling, Dubravka will reflect on the current state pooling and help SAA set the stage for its interactive case study. 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 21:

8:00 am **Breakfast Buffet**

9:00 am **Welcome and Opening Remarks: Setting the Stage**

Alton Cogert, President & CEO, Strategic Asset Alliance

Today's agenda will cover several key topics facing insurer investments today and in the future. This opening session will provide an overview of what issues will be addressed by the day's various speakers and why these topics should be on top of every insurer's mind.

Additionally, SAA will discuss, "A.I.: Who, What, Where, When, Why?" This quick-hitting segment will review SAA's view of the state of AI for insurer investments, as well as what insurers/pools should be mindful of in the early stages (*i.e. how it's used by managers, the hype cycle, resources, etc.*).

9:30 am **Making the Juice Worth the Squeeze**

Insight Investment

In the prior search for yield, insurers were exploring risk asset classes they wouldn't have previously considered. Now, with the script having flipped, Insight Investments will discuss where in the risk asset space insurers are finding the most benefits.

10:15 am **Break**

- 10:30am **Finding Value in the Short- and Long-Term**
New England Asset Management
- As insurers continue to evaluate their fixed income allocation in today's rate and yield environment, New England Asset Management will review where insurers are finding opportunities in the short-term, while keeping the long-term enterprise perspective in mind.
- 11:15 am **Break**
- 11:30 am **Navigating Incoming Credit Risk**
SLC Management
- Whether it's from corporate bonds, the transition between public vs. private credit, or other market trends, SLC will spotlight opportunities in insurers' investment portfolios that may help address these incoming changes.
- 12:15 pm **Lunch**
- 1:45 pm **The Inaugural Insurer Investment Forum Lightning Round**
SAA will invite several experts to the stage to share opinions, stories, and predictions in a fast-paced addition to the conference. In trios, invited participants will be tasked with answering as many questions as possible within the allotted time limit.
- Moderator: Strategic Asset Alliance
- Participants:**
AAM – Insurance Investment Management
Conning
Income Research + Management
Principal Asset Management
UMB Bank
- 2:45 pm **Break**
- 3:00 pm **Ask the Experts**
Panelists:
Insight Investment
New England Asset Management
SLC Management
- 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.
- 4:00 pm **Closing Remarks: Where to From Here?**
Alton Cogert, President & CEO, Strategic Asset Alliance
- To close the conference, SAA will review key takeaways from the Forum, as well as where insurers may look next as they consider changes to their portfolio. SAA will also preview economic and market trends that may be on the horizon.
- 4:30 pm **Adjourn & Farewell Reception**