

Insurer Investment Forum XXIV (2024) Sponsorship Opportunities Overview

March 20 – 21, 2024
Fairmont Scottsdale Princess
Scottsdale, AZ



7575 E Princess Dr.
Scottsdale, AZ, 85255
(~25 Minutes from Phoenix Sky Harbor International Airport)



STRATEGIC ASSET ALLIANCE
THE INSURANCE INVESTMENT SPECIALIST



You're Invited to Sponsor the Insurer Investment Forum XXIV

For the 24th consecutive year, Strategic Asset Alliance will host its annual Insurer Investment Forum, where CEOs, CFOs, CIOs, and Board/Committee Members from Life, Health and P&C insurers, Government Risk Pools, JPAs, 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 non-insurers are invited to attend and are limited in number.

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

The IIF XXIV will be held at **Fairmont Scottsdale Princess** on **March 20 - 21, 2024.**

As part of our continued efforts to provide educational value to our attendees, we have revamped the structure of this year's agenda and the benefits provided to both Gold and Silver sponsorship levels.

The Gold Sponsorship is limited to three firms. Gold Sponsors receive a 30-minute solo speaking slot (*followed by 15-minutes of Q&A*), along with participation as a panelist in a 60-minute "Ask the Experts" Q&A Panel.

New to the Forum this year is, "**The Insurer Investment Forum Lightning Round.**" Representatives from Silver sponsors will be invited on stage, in groups of three (3), to answer as many questions as they can. Questions will focus on key issues facing insurers and risk pools.

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



*All Gold Sponsorship Slots are Currently Filled

*SAA reserves the right to make changes to this schedule.



Sponsorship Availability:

Gold = 3 | Silver = 6

Gold Level Benefits:

- 30-Minute Solo Speaking Slot (*followed by 15-Minutes for Q&A*), Addressing One of These Topics*:
(*First-Come, First-Serve*)
 - Commercial Real Estate: How Real is a CRE Crisis?
Should Insurers Expect Shockwaves to their MBS/CMBS Allocation?
 - Finding Value in the Short- and Long-Term:
Finding opportunities in the short-term, while keeping the long-term enterprise perspective in mind.
 - Making the Juice Worth the Squeeze:
With the changes in rates & bond yields, where in the risk asset space are insurers finding the most benefits?
 - Incoming Credit Risk:
Where might insurers find opportunities in their portfolio to address these incoming changes?
 - Other: Topic Submitted by Speaker (*pending SAA Approval*)
- Participation in a 60-Minute “*Ask the Experts*” Q&A Panel
- Two (2) Representatives from Your Firm Can Attend
 - One (1) registration for your firm’s speaker | One (1) Additional Registration
- One (1) Guest Pass for an unaffiliated insurer or risk pool you designate (*pending SAA approval*)
- Attendee e-mail list before (*two weeks*) and after the conference
- Participation in post-conference Q&A Interview (*optional*) and Distribution of Presentations

Sponsorship Commitment Level:

\$25,000

Silver Level Benefits:

- One (1) Representative from Your Firm Can Attend
- Participation in the “*Insurer Investment Forum Lightning Round*”
- One (1) Guest Pass for an unaffiliated insurer or risk pool you designate
- Attendee e-mail list before (*two weeks*) and after the conference
- Participation in post-conference Q&A Interview (*optional*)

Sponsorship Commitment Level:

\$15,000





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 XXIV

Please accept our application to be a:

_____ **Gold Sponsor: \$25,000**

_____ **Silver Sponsor: \$15,000**

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 (Tentative): 2024 Insurer Investment Forum

Wednesday, March 20:

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 21:

8:00 am **Breakfast**

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

Alton Cogert, President & CEO, Strategic Asset Alliance

9:30 am **Gold Sponsor Topic #1**

Presenter: Gold Sponsor

10:15 am Break

10:30 am **Gold Sponsor Topic #2**

Presenter: Gold Sponsor

11:15 am Break



Sample Agenda (Tentative): 2024 Insurer Investment Forum

- 11:30 am **Gold Sponsor Topic #3**
Presenter: Gold Sponsor
- 12:15 PM Lunch
- 1:45 pm **The Inaugural Insurer Investment Forum Lightning Round**
Presenters: Silver Sponsors
Moderated by SAA
- 2:45 pm Break
- 3:00 pm **“Ask the Experts” Q&A Panel**
Panelists: Gold Sponsors
Moderated by SAA
- 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
- 4:30 pm **Adjourn & Farewell Reception**