



2012
Round Up 
Texas Association of
Life & Health Insurers

Park Hyatt Aviara San Diego, California
July 29–August 1, 2012

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Message from the Chairman

Welcome to the 2012 Round Up!

We're pleased you've made the trip to be a part of what we believe may be one of the most enlightening annual meetings ever. Not only will we hear in-depth presentations on topics important to our industry, but we'll also have the opportunity to hear the latest on business, regulatory and technology developments that are transforming our operations and our lives.

This year's Round Up includes some of our state's most influential and informed leaders, who will be joining us to provide a forecast of what we can expect during the 2013 session. It also includes insightful presentations on the changing national and state political landscape that will guide future policy discussions.

As always, we've built time into the program for fun, networking, and reflecting with your colleagues from across the country about these changing times.

As we gather for this year's Round Up, it's appropriate that we also acknowledge the tremendous progress TALHI is making as an organization. The adoption of a formal business plan, the integration of financial controls for the organization, the assembly of a strong and effective lobby team, and the growth of our political action committee, LIPAC, are all a part of the evolution of an association that's gaining in stature and respect.

Each of you has been a part of these achievements and should take pride in knowing that you helped make TALHI's success possible. As we begin another exciting Round Up, let us reflect upon the efforts that have brought us to this point as we prepare for the future.

Have a great time!

Sincerely,
Ron Doughty
TALHI, Chair 2011-2012



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Jim Lewis, *Immediate Past Chairman*

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Tom Munson, *Vice Chairman*

Landmark Life Insurance Company

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Mark France

Funeral Directors Life Insurance Company

Peter Hennessey, III

GPM Life Insurance Company

David Hill

Assurant

Susan Jennings

Life Insurance Company of the Southwest

Ric Jernigan

National Farm Life Insurance Company

Ted Kennedy

The Variable Life Insurance Co. (VALIC)

Ron Taylor

Blue Cross & Blue Shield of Texas

Gil Valdes

New York Life Insurance Company

Schedule of Events

Sunday, July 29, 2012

10:00 – 11:30 a.m.	TALHI Board Meeting	Laviana Room A
11:00 a.m. – 4:30 p.m.	Leisure Activities <i>(optional)</i>	
5:30 – 7:00 p.m.	Welcome Reception <i>SPONSORED BY: AMERICAN NATIONAL</i>	Game Room

Monday, July 30, 2012

7:00 – 8:00 a.m.	Golf Breakfast <i>SPONSORED BY: NATIONAL FARM LIFE</i>	Clubhouse Putting Green
8:00 a.m. – 1:00 p.m.	LIPAC Golf Tournament	Aviara Golf Club
11:00 a.m. – 4:30 p.m.	Leisure Activities <i>(optional)</i>	
1:00 – 2:30 p.m.	Golf Luncheon and Awards <i>SPONSORED BY: PACIFIC LIFE</i>	Palmer Pavilion
5:30 – 6:45 p.m.	Chairman’s Reception <i>SPONSORED BY: PARKWAY ADVISORS</i>	Laviana Terrace
7:00 p.m.	LIPAC Leadership Dinner <i>(by invitation only)</i>	Tranquility Pool

Tuesday, July 31, 2012

7:30 a.m.	Breakfast Buffet	Avalon Foyer
8:30 a.m.	Welcome and Opening Remarks <i>Ron Doughty, Prudential</i>	Avalon Room
8:40 a.m.	The Executive Director’s Report <i>Jennifer Cawley, TALHI</i>	Avalon Room
9:00 a.m.	History of TDI, Where It’s Been and Where It’s Going <i>Bruce McCandless III, Mitchell Williams</i> <i>Pati McCandless, Greenberg Traurig</i>	Avalon Room
10:00 a.m.	Break	
10:15 a.m.	The Changing Political Landscape <i>Michael Davis, BIPAC</i>	Avalon Room
11:15 a.m.	Texas Legislative Forecast: Legislator Panel <i>Hon. Jim Pitts, Chair, House Appropriations</i> <i>Hon. Larry Taylor, Chair, House Elections</i> <i>Hon. Kelly Hancock</i> <i>Hon. Kenneth Sheets</i>	Avalon Room
12:00 p.m.	Keynote Luncheon: State of Insurance in America <i>Governor Dirk Kempthorne, ACLI</i>	Laviana Room
1:30 p.m.	Breakout Sessions*	Filliary, Kingfisher A & B
3:15 p.m.	Adjourn for the Day	
6:30 p.m.	Gala Reception and Dinner—Luau on the Lawn <i>SPONSORED BY: PRUDENTIAL</i> <i>(Dinner to be served at 7:15 p.m.)</i>	Palm Courtyard

Schedule of Events

Wednesday, August 1, 2012

8:00 a.m.	Breakfast Buffet	Avalon Foyer
9:00 a.m.	Opportunities in a Low Interest Rate Environment: Enhancing Surplus and Reducing Risk <i>Theron R. Holladay, Parkway Advisors</i>	Avalon Room
9:45 a.m.	2013: Politics and Business in Texas <i>Bill Hammond, Texas Association of Business</i>	Avalon Room
10:15 a.m.	TALHI Legislative Outlook 83rd Legislative Session <i>Jennifer Cawley, TALHI</i> <i>Jay Thompson, Thompson Coe</i>	Avalon Room
11:00 a.m.	Closing Remarks	Avalon Room



*2012 Round Up Breakout Sessions

Breakout Session 1: (1:30–2:00 p.m.)

1. **Smaller Company Networking Roundtable**
Lynn Bockhorn, Germania
2. **The Importance of Business Involvement in Elections**
Michael Davis, BIPAC
3. **Maximizing Mobile Technology in Your World**
Jake Fields, Treeline Interactive

Breakout Session 2: (2:05–2:35 p.m.)

1. **Emerging Life & Annuity Issues Roundtable**
Gil Valdes, New York Life
2. **Post SCOTUS: What's Next for the Affordable Care Act**
Claudia Tucker, AHIP
3. **Maximizing Mobile Technology in Your World**
Jake Fields, Treeline Interactive

Breakout Session 3: (2:40–3:10 p.m.)

1. **Emerging Life & Annuity Issues Roundtable**
Skip Braziel, Met Life
2. **Post SCOTUS: What's Next for the Affordable Care Act**
Claudia Tucker, AHIP
3. **The Importance of Business Involvement in Elections**
Michael Davis, BIPAC

Conference Presenters

Jennifer Ahrens Cawley

Jennifer Ahrens Cawley has been the Executive Director of TALHI since 2008. Most recently, she was the Senior Associate Commissioner for the Life, Health & Licensing program at the Texas Department of Insurance. In that capacity, Mrs. Cawley oversaw the regulation of a wide range of life, annuity, accident and health insurance and related coverages offered by insurance companies in addition to the licensure of insurance agents and adjusters in Texas.

From 2004 to 2005, Mrs. Cawley acted as general counsel and adviser for Governor Rick Perry's Office of Budget, Planning and Policy. In that capacity, Mrs. Cawley advised the governor on policy and budget issues primarily related to insurance and the workers' compensation system. Mrs. Cawley served as general counsel to Senator Jane Nelson of Grapevine and as legislative aide to Senator Jeff Wentworth of San Antonio. She was also government relations liaison for the Texas Department of Family and Protective Services. Mrs. Cawley graduated from Texas Tech University with a Bachelor of Science in agricultural and applied economics and from The University of Texas School of Law.

Michael Davis

Michael R. Davis is the Senior Vice President of Political Programs for the Business Industry Political Action Committee (BIPAC). In this capacity, he has implemented a set of political programs focusing on independent expenditures and candidate advocacy with BIPAC's extensive state partner network. The collaborative programs ran over 12,000 targeted Internet ad campaigns in 36 congressional contests, completed the first ever U.S. nationwide buyout of YouTube by a political candidate or organization and made over 300 million web impressions to deliver pro-jobs messages to voters. The Access Point, a leading technology blog, described the programs as one of the five "best of the best programs" in the 2010 election cycle as a result of strategic and cutting-edge use of Internet campaign activities.

Prior to joining BIPAC, Michael oversaw the Political Affairs Department at the Indiana Chamber of Commerce and ran Indiana Business for Responsive Government for nearly 13 years. Under his guidance, over 75 percent of

the Chamber-endorsed candidates in competitive races won and 85 percent of Indiana Chamber contributions went to winning candidates. He created the Chamber's grassroots advocacy program, the Indiana Prosperity Project (IN P2) and the Indiana Chamber Congressional Action Committee.

Jake Fields

Jake has been involved with technology development since the early days of the web, exploring all realms of online marketing, building interfaces for Internet-related desktop applications and software within the online advertising industry. Since then, Jake has had a passion for embracing emerging technology to create exciting experiences for web users, which led to the creation of Treeline Interactive in South Lake Tahoe circa 2004.

Treeline's initial focus was to provide interactive media solutions within the action sports industry. In 2008, Jake, along with Treeline, relocated to sunny San Diego, where he continues to manage, grow and expand the business.

Treeline has worked with a range of sports, medical and retail brands to help them embrace emerging digital trends. By combining social media strategies with his experience in online advertising and rich media, he has been able to help a variety of brands launch successful ROI-driven web campaigns, new web technologies and introduce a range of mobile products.

Aside from his work with Treeline, Jake is dedicated to the community he lives in, formerly teaching classes at South Lake Tahoe Community College and currently at San Diego State University. He is also on the board of the local Ad2 networking group, a mobile committee chair on the board of the San Diego Ad Club, as well as the communication chair for the San Diego Coastal Professional group. He has also created a Corporate Social Responsibility Tree Gifting program through the National Arbor Day Foundation as a way to continuously give back to forests that have been devastated by fires or disease.

Bill Hammond

Bill Hammond was named President and Chief Executive Officer of Texas Association of Business in April 1998. Prior

Conference Presenters

to coming to TAB, he served for three years as chairman of the Texas Workforce Commission (TWC), a position to which he was appointed by then-Governor George W. Bush. The TWC was created by the Texas Legislature in 1995 to consolidate all of the state's workforce-related programs. Hammond also served as employer representative on the three-member commission.

A four-term member of the Texas House of Representatives during the 1980s, Hammond successfully authored the Texas Education Agency Sunset Bill, and was named one of the state's top ten legislators by Texas Monthly and Dallas Morning News. Hammond was owner and president of Dallas Tent and Awning Company prior to his appointment to the TWC. He and his wife, Deborah, reside in Austin. She is a licensed clinical social worker. The couple has three children: John, Phil and Caroline.

Rep. Kelly Hancock

First elected in 2006, Representative Kelly Hancock is serving his third term in the Texas House of Representatives, representing Northeast Tarrant County.

During the 82nd legislative session, Hancock served on the House Committee on Insurance, the House Committee on Environmental Regulation and as Vice Chairman of the Local and Consent Calendar Committee. Kelly was reappointed chairman of the Republican Caucus Policy Committee.

Numerous organizations such as the Texas Conservative Coalition and the Texas Heritage Alliance have recognized Representative Hancock for his efforts in promoting fiscal responsibility and strong conservative values. Among other awards, he was presented the "Legislator of the Year" Award by the Texas Fire Chiefs Association and the "Katie Sherrod Advocacy Award" for advocating for victims of domestic violence. Hancock was also named "Champion for Free Enterprise" by the Texas Association of Business and a "Taxpayer Hero" by the Texans for Fiscal Responsibility.

A graduate of Baylor University with a degree in business, Hancock possesses an extensive business background through his work at Advanced Chemical Logistics, his family-founded chemical distribution company. Hancock

began his commitment to public service shortly after the birth of his first child, Chloe, and spent the next 13 years serving on the Birdville ISD School Board.

Kelly and his wife, Robin, have been married 24 years and have three children: Chloe, Skylar and Harrison. As a family, the Hancocks stay very involved in the community through their participation in school, church and community events.

Theron Holladay

Theron R. Holladay is the President and CEO at Parkway Advisors. He has over 18 years of experience in investing for insurance companies and understands how investment choices relate to net investment income, statutory financials and cash-flow sensitivity testing. Additionally, he has an in-depth understanding of statutory accounting and is trained in top actuarial software. His passion for investing for insurers lies in incorporating all aspects of an insurer's specific needs, products and objectives in order to optimize the investment portfolio while reducing risk for each insurance company. Mr. Holladay holds the Chartered Financial Analyst designation and is Series 65 licensed.

Governor Dirk Kempthorne

Governor Dirk Kempthorne was first elected to public office as mayor of Boise, Idaho in 1985, where he served, for seven years. After being elected into the U.S. Senate in 1993, he authored two bipartisan bills on state mandates and safe drinking water that remain enacted today. He assumed the role of Idaho's 30th Governor in 1999 until 2006, when he was sworn in as U.S. Secretary of the Interior under President George W. Bush. In this role, Kempthorne managed 20 percent of U.S. lands with an annual budget of \$18 billion.

Governor Kempthorne is now President and CEO of the American Council of Life Insurers (ACLI). He is the chief representative and spokesman for the life insurance industry before Congress, the administration and in all state capitals. ACLI's more than 300 legal reserve life insurer and fraternal benefit society member companies account for over 90 percent of the assets and premiums of the U.S. life insurance and annuity industry.

Conference Presenters

Bruce McCandless III

Bruce McCandless III received his J.D. from UT Austin in 1989 and was then admitted to practice law in Texas, New York and the District of Columbia. He served as Assistant Attorney General for the State of Texas from 1995 to 1997, where he prosecuted dram shop fatality cases for TABC. From 1997 to 2000, he represented the Texas Department of Insurance in consumer protection litigation, legislation and agency rules as an Enforcement Attorney.

Mr. McCandless is a member of the Austin Bar Association and the State Bar of Texas. He currently practices at the Mitchell, Williams, Selig, Gates & Woodyard law firm in Austin, where he specializes in insurance regulation and administrative litigation. He advises insurers, agents and lenders on operational matters such as company formation, acquisitions, dissolutions and contracts. He represents insurance companies and agents in disputes before the Texas Department of Insurance and in the state and federal courts of Texas.

Patricia (Pati) Fuller McCandless

Patricia Fuller McCandless, of counsel at Greenberg Traurig, LLC, practices insurance and regulatory law and possesses over 18 years of legal experience in managed care and health insurance regulation. Her work includes legislative and executive branch advocacy in Texas, and she has experience formulating political strategy, crafting public policy positions, and negotiating and drafting legislation. She is a frequent public speaker on legislative and health care issues.

Ms. McCandless is a board member of the Texas Health Insurance Risk Pool and previously served on the boards of the Texas Association of Business, the Texas Association of Health Plans and the Texas Motion Picture Alliance. Ms. McCandless is a graduate of Texas A&M University and New York Law School. She is admitted to practice law in Texas and Washington, D.C.

Rep. Jim Pitts

James R. Pitts currently serves in the Texas House of Representatives and chairman of the House Appropriations Committee. He received his J.D. from

Southern Methodist University and has practiced general and real estate law for 34 years in Waxahachie, Texas. Since assuming legislative office in 1993, Pitts has served on several House committees, including Economic Development, Transportation, Redistricting and Federal and International Relations.

Mr. Pitts owns the Ellis County Abstract and Title Company, is a director of Citizens National Bank in Waxahachie, a director of Sims Library, a past president of the Waxahachie Chamber of Commerce, and past president of the board of trustees of Presbyterian Children's Services. Prior to his election to the House, Jim was a 14-year member of the board of trustees for the Waxahachie Independent School District and served as its president during his tenure.

Rep. Kenneth Sheets

Representative Kenneth Sheets is a member of the Texas House of Representatives. Shortly after graduating from Grand Prairie High School, he enlisted in the Marine Corps. He was promoted to Second Lieutenant in the Marine Corps Reserve shortly after receiving his undergraduate degree in political science from UT Arlington. In 2004, he earned a Juris Doctor from the Dedman School of Law at SMU.

As part of the surge of troops ordered by President George W. Bush, Representative Sheets was deployed to Iraq and operated out of Fallujah with 2nd Reconnaissance Battalion, II Marine Expeditionary Force (FWD) from September 2007 until May 2008. His decorations for service include the Navy/Marine Corps Achievement Medal with two gold stars in lieu of second and third award; Selected Marine Corps Reserve Medal with one bronze star in lieu of second award; and the Iraq Campaign Medal. Representative Sheets has been a Marine for 14 years.

Representative Sheets and his wife Michelle were married in 2000. They are active parishioners of the St. Thomas Aquinas community.

Rep. Larry Taylor

Representative Larry Taylor was born and raised in

Conference Presenters

Friendswood, Texas. He attended Friendswood schools from 1st through the 12th grade and received his Bachelor of Business Administration from Baylor University in 1982. He is the owner of Truman Taylor Insurance Company in Friendswood. Representative Taylor has an extensive record of public service that includes his election to City Council and as Mayor Pro-Tem of the City of Friendswood and membership with numerous boards and organizations including the Friendswood Economic Development Committee (chairman), Friendswood Chamber of Commerce (president) and Friendswood Rotary Club (president). He was elected to the Texas Legislature in 2002 and is currently serving his fifth term.

Representative Taylor currently serves as Chair of the House Committee on Elections and is a member of the House Committee on Insurance. In 2011, he was unanimously re-elected by his colleagues to serve as the Chair of the House Republican Caucus. Representative Taylor has received various awards during his legislative service, including the Friend of the Taxpayer Award given by the Americans for Prosperity Organization, the Heritage Alliance's Conservative Leader Award, the Texas Hero award from the Texas Public Policy Foundation, and the Freshman of the Year award from the Texas Republican Caucus. Representative Taylor has been presented with the Free Enterprise Award from the Texas Association of Business for the past three legislative sessions.

Representative Taylor and his college sweetheart Kerri have three children, Trudy, Carly and Jacob.

Jay A. Thompson

Jay A. Thompson is a partner with the firm of Thompson, Coe, Cousins & Irons, LLP. He practices primarily in insurance regulatory and legislative areas, as well as litigation matters that affect both the life/health and property/casualty insurance companies. Mr. Thompson earned his Bachelor of Business Administration in accounting from Texas Tech University and his Juris Doctor from The University of Texas at Austin. In addition to representing other insurance associations, he has served as general counsel for TALHI since its inception in 1997. Prior to that, he was general counsel for one

of its predecessors, the TLIA, for a number of years. Mr. Thompson also served with distinction in the U.S. Air Force Reserves as a judge advocate from 1972 to 1999.

Claudia Duck Tucker

Claudia Duck Tucker is the Regional Director for America's Health Insurance Plans (AHIP) covering the southern part of the country. She joined AHIP in March 2012. Prior to joining AHIP she was the Senior Director of State Government Affairs and Policy for Medco Health Solutions with a 16 state territory. In that capacity she has included work with RGA, DGA, DAGA, RAGA, ALEC and CSG in her portfolio along with a national project working in partnership with community pharmacists to improve patient care and decrease costs. Claudia started her career in government affairs after serving as Chief of Staff to the Virginia Speaker of the House. Prior to that she was Manager of Domestic and International Distribution for Philip Morris, Inc.

Claudia is a graduate of Virginia Commonwealth University and lives in Amherst County, Virginia, on a seventh-generation family cattle farm with her husband Bill. They have three daughters. She was elected to the Amherst County Board of Supervisors in 2009 and served as the first woman Chair in the County's history.

She enjoys restoration of Forest Hill, which is the family home built in 1803, gardening, travel and working on the farm.

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Membership Meeting Information



Membership Meeting Agenda

(Meeting will occur immediately following lunch on Tuesday, July 31, 2012)

I. Officer and Board of Directors Election

Nominees

Board of Directors:

Ron Taylor, *Blue Cross/Blue Shield of Texas*

David Hill, *Assurant*

Ric Jernigan, *National Farm Life*

Dwain Akins, *American National*

Bo Gilbert, *USAA*

John Camillo, *Unitrin/The Reliable Life*

Treasurer:

Skip Braziel, *MetLife*

II. Financial Update

TALHI's financial position continues to be positive. A copy of TALHI's most recent financial statement is available to members at the registration desk.

III. New Members

TALHI would like to welcome its newest members in 2012:

- Genworth
- New Era Life Insurance Company
- Texas Star Alliance

Legislative Preview

December 7, 2012

Barton Creek Resort
Austin, Texas

Legislative Lunch and Lobby Day

Sponsored by NAIFA-TX/TAHU/TALHI

January 22, 2013

Sheraton at the Capitol | Austin, Texas

Round Up

September 29–October 2, 2013

Marriott Hotel and Golf Club at Champions Circle
Fort Worth, Texas

LIPAC Golf Tournament



Sponsored by:



Monday—July 30, 2012

7:00 – 8:00 a.m.	Golf Breakfast <i>SPONSORED BY: NATIONAL FARM LIFE</i>	Clubhouse Putting Green
8:00 a.m. – 1:00 p.m.	LIPAC Golf Tournament <i>BEVERAGE CART SPONSORED BY: NATIONAL FARM LIFE</i>	Aviara Golf Club
1:00 – 2:30 p.m.	Golf Luncheon and Awards <i>SPONSORED BY: PACIFIC LIFE</i>	Palmer Pavilion

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A special thanks to these organizations who continue to support TALHI and our issues of mutual interest.



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Best Life & Health Insurance Company
Blue Cross and Blue Shield of Texas
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