

# 2018 CEFLI Calendar of Events.

| JANUARY                                                                                                                                                                                   | FEBRUARY                                                                                                                         | MARCH                                                                                                                                                                           | APRIL                                                                                                                           | MAY                                                                                                                                                                                                                                                       | JUNE                                                                                                                                                                             |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>1/29 Webinar</b><br/> <b>Compliance Resources</b><br/>                     – Strategies for leveraging your CEFLI membership.</p>                                                   |                                                                                                                                  | <p><b>Date TBD Webinar</b><br/> <b>Ethics</b> – Exploring the strategies companies will use to promote ethics within their organizations.</p>                                   | <p><b>4/12 Webinar</b><br/> <b>Antifraud</b> – An update on fraudulent activities impacting the life insurance marketplace.</p> | <p><b>5/1 Summit Meeting</b><br/> <b>Chicago, IL</b><br/> <b>The Future of Sales Standards in the Life Insurance Industry</b><br/> <b>5/21-23 Education and Training</b> <i>Nashville, TN</i><br/> <b>Compliance Fundamentals Training Conference</b></p> | <p><b>6/13 Regional Compliance Forum</b><br/> <i>Charlotte, NC</i><br/> <b>Eastern Regional Compliance Forum</b></p>                                                             |
|                                                                                                                                                                                           |                                                                                                                                  | <p><b>3/6 Webinar</b><br/> <b>Third Party Administrator (TPA) Oversight</b> –<br/>                     Effective practices to supervise and monitor the activities of TPAs.</p> |                                                                                                                                 | <p><b>5/30 Webinar</b><br/> <b>DOL Fiduciary Rule</b> –<br/>                     Key compliance issues to consider in light of the delayed effective date.</p>                                                                                            | <p><b>6/15 Benchmarking Study</b><br/> <b>Compliance &amp; Ethics</b></p>                                                                                                        |
| JULY                                                                                                                                                                                      | AUGUST                                                                                                                           | SEPTEMBER                                                                                                                                                                       | OCTOBER                                                                                                                         | NOVEMBER                                                                                                                                                                                                                                                  | DECEMBER                                                                                                                                                                         |
| <p><b>7/25 Webinar</b><br/> <b>Product Innovations</b> –<br/>                     What is the role of compliance in light of new product innovations for the life insurance industry?</p> | <p><b>8/17 Benchmarking Study</b><br/> <b>Annuity Suitability</b></p>                                                            | <p><b>9/10-12 Annual Conference</b><br/> <i>Le Meridien Denver, CO</i><br/> <b>2018 CEFLI Annual Conference and CCO Leadership Forum</b></p>                                    |                                                                                                                                 | <p><b>11/14 Regional Compliance Forum</b><br/> <i>Portland, OR</i><br/> <b>Western Regional Compliance Forum</b></p>                                                                                                                                      | <p><b>12/18 Webinar</b><br/> <b>Year in Review</b> –<br/>                     A look back at the year's compliance &amp; ethics milestones and a glimpse of what lies ahead.</p> |
|                                                                                                                                                                                           | <p><b>8/30 Webinar</b><br/> <b>Affiliate Member Guest Webinar</b> – Insurer Use of Algorithms – Why “Big Data” is a Big Deal</p> | <p><b>9/28 Webinar</b><br/> <b>Compliance Tools - Ensignt</b> – A Digital Platform for NY Reg. 187 Compliance and Beyond</p>                                                    | <p><b>10/24 Regional Compliance Forum</b><br/> <i>Minneapolis, MN</i><br/> <b>Midwestern Regional Compliance Forum</b></p>      | <p><b>11/27 Webinar</b><br/> <b>Affiliate Member Guest Webinar</b> –<br/>                     Topic TBD</p>                                                                                                                                               |                                                                                                                                                                                  |