

Insurance Investment Executives' Annual Meeting

2025

July 16 - 17, 2025 • Chicago, Illinois

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The **InsuranceAUM.com Insurance Investment Executives' Annual Meeting** agenda is expertly crafted by our **Executive Council**—a distinguished group of experienced insurance asset owners who bring expert insights and strategic guidance. Their leadership ensures a dynamic and impactful lineup, carefully shaping session topics and selecting top-tier speakers.

A special thank you to our **2025 Co-Chairs, John Patin and T.C. Wilson**, for their vision and dedication to making this event a success.

Tuesday, July 15 – Park Hyatt Hotel, NoMI Rooftop Garden

★ Welcome Reception, 5:30 – 7:00 PM, *Sponsored by Conning*

DAY 1

Wednesday, July 16 – University of Chicago's Gleacher Center

- ★ Breakfast
- ★ Insurance Investor Sessions
- ★ Keynote Speaker Howard Marks,
Co-Founder and CIO of Oaktree Capital
- ★ Lunch
- ★ Dinner & Live Music at River Roast (6:00 PM)

DAY 2

Thursday, July 17 – University of Chicago's Gleacher Center

- ★ Breakfast
- ★ CIO Panel
- ★ Insurance Investor Sessions
- ★ Closing Insurer-Only Luncheon -
Remarks from Host & Co-Chairs



**The University of Chicago Booth
School of Business Gleacher Center**

DAY 1

Wednesday, July 16

- ★ **8:30 - 9:00 AM** **Breakfast**
- ★ **9:00 - 10:30 AM** **Insurer-Only Session**
- ★ **10:30 - 10:50 AM** **Welcoming Remarks**
Stewart Foley, CFA, *InsuranceAUM.com*
- ★ **11:00 - 11:50 AM** **Insurance Landscape**
- ★ **12:00 - 1:00 PM** **Lunch with Macro Discussion**
Jim Bianco, *Bianco Research*
Tom Tzitzouris, *Strategas*, *Head of Fixed Income*
- ★ **1:10 - 2:00 PM** **Keynote Speaker, Mr. Howard Marks**
Co-Founder and CIO of Oaktree Capital
- ★ **2:10 - 3:00 PM** **Real Estate Debt v. Equity**
Moderator: Nazar Alobaidat, *Enstar Group*
- ★ **3:10 - 4:00 PM** **Asset Based Finance: *Unpacking the Structure***
Moderator: Joe Eppers, CFA, *Selective*
- ★ **4:00 - 5:00 PM** **Best Ideas Panel**
Moderator: John Patin, *Somers Group*



**The University of Chicago Booth
School of Business Gleacher Center**

DAY 2

Thursday, July 17

★ **8:30 - 9:00 AM**

Breakfast

★ **9:00 - 9:50 AM**

CIO Panel

Moderator: Steve Smith, *Neuberger Berman*

Janelle Woodward, *Allstate Investments* & Joe Eppers, *Selective (P&C)*

Waymond Harris, *Blue Cross Blue Shield of Michigan (Health)*

Amy Stepnowski, *Hartford Investment Management* & John Ripley, *Principal (Life)*

★ **10:00 - 10:50 AM**

Private Equity & Illiquid Budget

★ **11:00 - 11:50 AM**

Private Credit: *Beyond Middle Market Direct Lending*

Moderator: Lale Topcuoglu, *SwissRe*

★ **12:00 - 1:00 PM**

Insurer-Only Lunch

Keynote Speaker

Mr. Howard Marks

Co-Founder and CIO of
Oaktree Capital



★ Executive Council



Nazar Alobaidat
Enstar Group



Sanjay Chawla
FM Global



Susan Chung
AMICA



Michael Demuth, CFA
Allianz



Aaron Diefenthaler, CFA
RLI



Nizida Arriaga
AAA Auto Club Group



Joe Eppers, CFA
Selective



Mike Huff
PartnerRe



Waymond Harris
Blue Cross Blue
Shield of Michigan



Tom Leone
Sompo International



Paul Joss
Pacific Life



Nick Martowski, CFA
MagMutual



★ Executive Council



Hiren Parikh, CFA
Allstate



James Overpeck
Hanover Insurance
Group



David Phillips
Axis Capital



John Patin, Co-Chair
Somers Group



Mark Silverstein
Sampo International,
Retired



Nico Santini
Coverys



Christine Todd
Arch Capital Group



Amy Stepnowski
Hartford Investment
Management



T.C. Wilson, Co-Chair
The Doctor's Company



Lale Topcuoglu
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Thank you for your consideration.