

8:30 a.m.**ALL Users' Group Welcome**

Presenters: Patti Reardon (John Hancock); Kathy Fuls-Sternke (MetLife); Tammy White (Ohio National); Joe Frutuoso (CSC)

All are welcomed as the VANTAGE-ONE/Wealth Management Accelerator Users' Group officers introduce themselves and share information relevant to the user community since the last conference. CSC will also share general conference information and a report on the officers' meeting.

9:15 a.m.**COMP Compensation Group Welcome**

Presenters: Melissa Kees (Sammons Financial Group); Sheryl Ridgley (Ohio National)

The Compensation (DSS and PerformancePlus) product chairs and CSC's compensation and contracting professionals will welcome conference attendees and provide an overview of Compensation and Agent Contracting sessions. This is a good opportunity to network with other DSS and PerformancePlus clients.

V1/wmA-ANN Annuity Group Welcome

Presenter: Tammy White (Ohio National)

Come meet other Annuity company representatives attending the conference and start making contacts. Annuity product chairs will welcome participants and discuss sessions specifically geared toward Annuity clients.

V1-TRAD Traditional Welcome

Presenters: Jean Hawker (American Family); Mary Sliach (MassMutual Financial)

Come meet other Traditional company representatives attending the conference and start making contacts. Product chairs will welcome participants and discuss sessions specifically geared toward Traditional clients.

V1-UL/VUL Universal Life Group Welcome

Presenters: Sandi Mercier (MassMutual Financial); Stephen Brennan (Prudential Financial)

Meet conference participants who are interested in the VANTAGE-ONE UL/VUL component. Product chairs will highlight conference sessions of interest to UL/VUL participants. Come network and share your objectives for the conference with others.

10:15 a.m.**ALL Data Masking for Everyday Usages - Panel Discussion**

Presenters: Patti Reardon (John Hancock); Kathy Fuls-Sternke (MetLife); Tammy White (Ohio National)

This panel discussion is dedicated to understanding the requirements and issues of data masking for testing and production.

11:00 a.m.**COMP Business and IT Roundtable**

Presenters: Melissa Kees (Sammons Financial Group); Sheryl Ridgley (Ohio National); Dan Nascimbeni (CSC)

Join an informal roundtable discussion that covers both technical and business issues regarding current and approaching challenges in agent appointments, monitoring and

compensation. This participant-driven discussion will focus on business issues and individual client experiences, as well as topics that are technically challenging.

V1/wmA-ALL Wealth Management Accelerator's Auto Annuitization and Payout

Presenter: Bill Leary (CSC)

This session will show Wealth Management Accelerator's new annuitization process and online quote functionality to internally annuitize an accumulation contract into a payout contract. The process also includes proposals and projections on payout contracts that would be established using the annuitized funds.

V1-TRAD Traditional Business Processing

Presenters: Jean Hawker (American Family); Mary Sliach (MassMutual Financial)

This roundtable discussion will address any topics attendees wish to bring with them, such as law changes, questions on how others are processing certain tasks, and general "how-do-you" questions. Enhancement ideas will also be discussed to determine interest.

1:00 p.m.**COMP Business and IT Roundtable (Cont'd)**

Presenters: Melissa Kees (Sammons Financial Group); Sheryl Ridgley (Ohio National); Dan Nascimbeni (CSC)

Join an informal roundtable discussion that covers both technical and business issues regarding current and approaching challenges in agent appointments, monitoring and compensation. This participant-driven discussion will focus on business issues and individual client experiences, as well as topics that are technically challenging.

V1/wmA-ALL Wealth Management Accelerator - The New Features

Presenter: Bill Leary (CSC)

CSC will present the functionality of the 2008 release of Wealth Management Accelerator and will discuss the continuing development of new functionality and system enhancements.

V1-TRAD Traditional Business Processing (Cont'd)

Presenters: Jean Hawker (American Family); Mary Sliach (MassMutual Financial)

This roundtable discussion will address any topics attendees wish to bring with them, such as law changes, questions on how others are processing certain tasks, and general "how-do-you" questions.

1:45 p.m.**COMP PerformancePlus 08.2.0 Release Update**

Presenter: Robert Mealey (CSC)

CSC will lead an overview and discussion about the functional and technical improvements being added to PerformancePlus for release 08.2.0.

V1/wmA-ALL Testing & Regression Data - Panel Discussion

Presenter: Joe Frutuoso (CSC)

Maintaining current regression data is a challenging task. Come discuss the best approaches to keeping your regression environment up-to-date.

2:30 p.m.

COMP New User Interface – Producer Database Workshop*Presenter: Dan Nascimbeni (CSC)*

This CSC-led workshop will demonstrate the producer database components of the new user interface, which will be available in late 2008. The demonstration will include contracts, agreements, licenses and appointments, as well as other components of the producer database.

V1/wmA-ALL Readiness of CSO Changes*Presenter: Bob Strain (CSC)*

In this session, we will discuss system readiness for administering the new CSO rules.

3:30 p.m.

COMP New User Interface – Policy Database Workshop*Presenter: Dan Nascimbeni (CSC)*

This CSC-led workshop will demonstrate the policy components of the new user interface, which will be available late 2008. The demonstration will include adjustments, financials and performance.

V1/wmA-ALL Upgrading to Product Wizard and the Tools that Get You There*Presenter: Steven Roy (CSC)*

This session will outline the requirements for migrating from CICS VSAM to Java Relational business rules and will also discuss productivity tools for testing automation of this complicated task. We will also discuss the tools' capability when upgrading from one level of Product Wizard to another.

4:15 p.m.

COMP New User Interface – Workshop Wrap-Up*Presenter: Dan Nascimbeni (CSC)*

This CSC-led workshop will wrap up the producer and policy database components of the new user interface, available in the 08.2.0 release of PerformancePlus.

V1/wmA-ALL Speed to Market – What to Do*Presenter: Kathy Fuls-Sternke (MetLife)*

Join us for a collaborative session to discuss tools that would be helpful to carriers in speeding time to market.

8:30 a.m.

COMP Upgrade Case Study – Phoenix*Presenters: Ken Sayles (CSC)*

This session will look at the roadmap Phoenix identified to upgrade to version 071.0 of PerformancePlus. We'll also discuss Phoenix's continued progress, as well as challenges the company met over the summer.

V1/wmA-ALL Regulatory Compliance Committee (RCC) Update*Presenter: Bob Strain (CSC)*

The Regulatory Compliance Committee (RCC) meets once a month by teleconference to discuss current and pending insurance regulatory issues affecting the user community. This session will review the current RCC docket, including items added since the last Users' Group meeting.

V1/wmA-TECH Cloud Computing*Presenter: Alex Carmack (CSC)*

Hardly a day goes by without another mention of Cloud Computing and how it is impacting the way businesses uses the Internet. This session will cover the concepts around Cloud Computing and Software as a Service (SaaS). We'll also discuss when your company may want to leverage these offerings.

9:15 a.m.

COMP Compensation Designer Updates*Presenter: Robert Mealey (CSC)*

CSC will lead an overview of the planned improvements to the Compensation Designer for 2008.

V1/wmA-ALL Wealth Management Accelerator Implementation Case Study*Presenters: Cami Jacobs and Craig Steinhoff (Thrivent Financial)*

Come join us for a presentation from a carrier who is implementing Wealth Management Accelerator. We'll learn about the techniques the carrier is using to implement the system, as well as the overall status of the project.

10:15 a.m.

COMP Engaging CSC – Roundtable Discussion*Presenters: Sheryl Ridgley (Ohio National); Ken Sayles (CSC)*

Many companies have engaged CSC in varying degrees to accomplish specific initiatives and provide general support. Join an informal discussion of the types of resources needed to support PerformancePlus. Learn how others organize in-house resources and engage CSC to augment their team's success.

V1/wmA-ALL Combining VANTAGE-ONE with Wealth Management Accelerator*Presenter: Dave Tognalli (CSC)*

We are all aware that at the end of 2008, VANTAGE-ONE and Wealth Management Accelerator will share a common architecture and product code base. Please join us for a presentation and discussion of what it means to have a combined system of VANTAGE-ONE and Wealth Management Accelerator.

11:00 a.m.

COMP Bonus Workbench*Presenter: Robert Mealey (CSC)*

Gain an understanding of how Bonus Workbench can augment your compensation through the aggregation and calculating of bonuses. Hear how others are using this tool and learn about the future plans for this product.

V1/wmA-ANN Annuity Business Processing*Presenter: Tammy White (Ohio National)*

Join us for a roundtable discussion on any topics attendees wish to raise, such as law changes, questions on how others are processing certain tasks, general “how-do-you” questions and enhancement ideas. Product chairs will also discuss what has occurred during the prior monthly calls.

V1/wmA-TECH Upgrading and Converting to Wealth Management Accelerator*Presenter: Steve Westerholm (CSC)*

In this session, we will discuss the migration paths to Wealth Management Accelerator that are available to VANTAGE-ONE clients. Migration is much easier than most expect, with immeasurable benefits to both the technical and business communities.

V1-UL/VUL Universal Life Business Processing*Presenters: Sandi Mercier (MassMutual Financial); Stephen Brennan (Prudential Financial)*

Bring questions related to the administration of UL/VUL policies on the VANTAGE-ONE platform. The agenda for this open discussion will be set by the participants. Discussion of each question/agenda topic will include participants sharing how they might have already solved the issue.

1:00 p.m.

ALL Product Accelerator Demonstration*Presenter: CSC*

CSC’s Product Accelerator software, pre-loaded with the most comprehensive insurance product content, dramatically reduces time to market from weeks to days and lets product owners focus on innovation. Come see a demonstration of this flexible system.

1:45 p.m.

V1/wmA-ANN Annuity Business Processing (Cont’d)*Presenter: Tammy White (Ohio National)*

Join us for a roundtable discussion on any topics attendees wish to raise, such as law changes, questions on how others are processing certain tasks, general “how-do-you” questions and enhancement ideas. Product chairs will also discuss what has occurred during the prior monthly calls.

V1/wmA-TECH Technical Roundtable*Presenter: Glenn Andrews (CSC)*

This two-part session will provide open discussions from a technical perspective on the current and upcoming challenges facing VANTAGE-ONE and Wealth Management Accelerator. Participants will share successes, make valuable contacts and discuss upcoming technical upgrades and challenges.

V1-UL/VUL Universal Life Business Processing (Cont’d)*Presenters: Sandi Mercier (MassMutual Financial); Stephen Brennan (Prudential Financial)*

Bring questions related to the administration of UL/VUL policies on the VANTAGE-ONE platform. The agenda for this open discussion will be set by the participants. Discussion of each question/agenda topic will include participants sharing how they might have already solved the issue.

2:30 p.m.

V1/wmA-ALL Externalizing Tax Functions using VP/MS Models*Presenter: Steve Cottle (CSC)*

Join us for a discussion of how MassMutual Financial is using VP/MS to provide consistency and a single point of maintenance for tax calculations in VANTAGE-ONE and Wealth Management Accelerator, as well as other administrative systems, pre-sale illustration systems and in-force illustration systems.

V1/wmA-TECH Technical Roundtable (Cont’d)*Presenter: Glenn Andrews (CSC)*

The roundtable continues with open discussions from a technical perspective on the current and upcoming challenges facing VANTAGE-ONE/Wealth Management Accelerator. Participants will share successes, make valuable contacts and discuss upcoming technical projects for Wealth Management Accelerator and PerformancePlus.



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8:30 a.m.**V1/wmA-ALL How to Write and Submit a System Problem Report***Presenters: Mary Sliech (MassMutual Financial); Bob Strain (CSC)*

Learn how to write a System Problem Report (SPR) request for CSC. We'll discuss the process and the templates used, as well as where they are kept and how to find out if a problem has already been reported.

9:15 a.m.**V1/wmA-ALL Business Meeting***Presenters: Patti Reardon (John Hancock); Kathy Fuls-Sternke (MetLife); Tammy White (Ohio National); Joe Frutuoso (CSC)*

This session is a forum for the user community to discuss with CSC the future direction of VANTAGE-ONE, Wealth Management Accelerator and PerformancePlus. The agenda for the spring 2009 Life and Annuity Users' Forum will be discussed. Suggested ideas for new sessions are welcome.

10:15 a.m.**COMP Compensation Testing Roundtable***Presenters: Melissa Kees (Sammons Financial Group); Lisa Siemonsma (Sammons Financial Group)*

Participate in an open discussion regarding your company's successes and challenges in testing practices, new system implementations, version upgrades and company mergers.

V1/wmA-ALL Quick Upgrade with the Help of Testing Tools*Presenters: Steven Roy and Joe Frutuoso (CSC)*

Upgrading from release to release can become a huge effort when it comes to testing alone. We will discuss tools and capabilities that can greatly reduce the testing effort for both the business and technical analysts.

11:00 a.m.**COMP Compensation Wrap-Up***Presenters: Melissa Kees (Sammons Financial Group); Sheryl Ridgley (Ohio National)*

In this session, we'll review what has been covered during the week and solicit feedback that can be used in planning future conferences.

V1/wmA-ALL The 2008 Features of Product Wizard*Presenter: Bill Leary (CSC)*

Come learn about the new features found in the newest version of Product Wizard.

1:00 p.m.**V1/wmA-ANN Annuity Requirement & Enhancement Workshop***Presenter: Tammy White (Ohio National)*

In this working session, participants will develop and finalize the requirements for enhancements that have been prioritized by client companies. The group will discuss items in the works and move them forward in the development process while clients are in a face-to-face meeting.

V1-TRAD Traditional Requirement & Enhancement Workshop*Presenters: Jean Hawker (American Family); Mary Sliech (MassMutual Financial)*

This will be a working session to develop and finalize the requirements for enhancements that client companies have identified as priorities as a result of a survey. The goal is to have group discussions on enhancement items that are currently in the works and help move them ahead in the development process.

V1-UL/VUL Universal Life Requirement & Enhancement Workshop*Presenters: Sandi Mercier (MassMutual Financial); Stephen Brennan (Prudential Financial)*

This is a working session to develop and finalize requirements for the enhancements that client companies have identified as priorities in a survey. The goal is to have group discussions on items in the works and help move them ahead in the development process.



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