TAI

#TAIUG2018 | MAY 9-11
REGISTRATION GUIDE

EMPOWERING ACTION

RENAISSANCE CHICAGO DOWNTOWN
CHICAGO, IL

ABOUT TAI USER GROUP - EMPOWERING ACTION

The Annual TAI User Group meeting, held this year at the Renaissance Chicago Downtown in Chicago, IL, provides a great opportunity for TAI users to network with over 150 industry professionals, learn about new TAI system enhancements, and gain valuable insights from industry experts. Attendees will benefit from engaging breakout sessions, product demos, and presentations that will empower users to explore new ways of using TAI and apply actionable takeaways to their business.

What to expect?

User Group 2018 will deliver an excellent program to help clients obtain the most value from TAI software. Hear from dynamic speakers, learn about new system enhancements first-hand, and take advantage of invaluable networking opportunities.

IMPORTANT DATES

Registration Opens Feb 12 — Reserve Hotel by Apr 17* — User Group 2018 May 9-11

Note: April 17 is the date the hotel block will close, but only if there are rooms that have not yet been booked. The block is expected to fill ahead of the cut-off date, reserving early is highly recommended. The hotel requires cancellations to be made 72 hours prior to check-in.

HOW TO REGISTER?

Registration is open February 12, 2018 - May 4, 2018.

STEP 1: Visit this link: TAI User Group 2018 Registration.

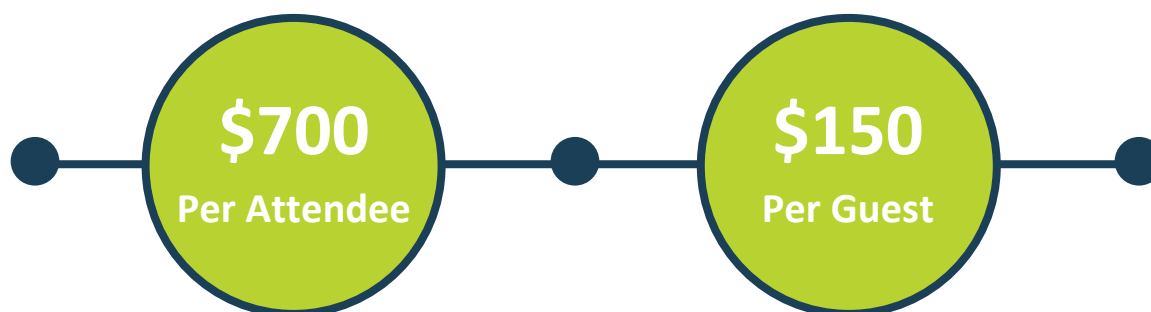**STEP 2:** Fill out the online registration form.

STEP 3: Contacts us with any inquiries by emailing usergroup@taire.com.

All attendees must create a registration account. To create your profile, please use your work e-mail address. Based on your e-mail domain, the system will determine eligibility for prepaid registrations.

The registration system will enable you to:

- Pay with major credit cards
- View breakout session descriptions
- Pre-schedule a Friday meeting with TAI staff
- View attendee list
- Print your personal agenda and receipts
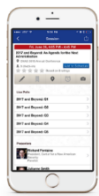- Log in and edit breakout session selections until May 4, 2018

REGISTRATION FEES

$700 Per Attendee

$150 Per Guest

Please note that if your company participates in the TAI Maintenance Program, your annual maintenance fee may cover the cost of your User Group registration under "prepaid registration". The number of prepaid registrations allotted to each client is specified in your Maintenance Agreement and has been linked to your work e-mail domain.

All guests are welcome to join the social events on both Wednesday, May 9 and Thursday, May 10.

DOWNLOAD THE APP

For this year's TAI #TAIUG2018, we've partnered with guidebook once again to create a mobile experience for you during the conference.

The app can be used on your iPhone, iPad, or Android device. By downloading it, attendees can view the attendee list, access personalized schedules, get important updates, participate in live polls, and much more.

How to Access the App on Your Mobile Device

- Download the Guidebook app for FREE in the Apple, Google, or Amazon app stores
- Once installed, open the app, and tap "enter passphrase" at the top of the app
- Type in the passphrase "taiug2018"
- Tap "download guide."
- Tap "open" to access the app

How to Access the App from Your Desktop

- Open web browser and visit this link.
- Type in the passphrase "taiug2018"
- Click "Submit"

If you have any questions about the app, you can email support@guidebook.com for help.

We'll provide a quick recap on how to download the app at User Group. In the meantime, stay tuned for a blog post explaining how to make the most of the app during the conference.

HOTEL RESERVATIONS

Host Hotel: Renaissance Chicago Downtown
Address: 1 West Upper Wacker Drive, Chicago, Illinois 60601 USA Click here for map.

Group Rate (Available Tuesday May 8 – Friday May 11, 2018): $283 USD per night, excluding taxes.
TAI UG Hotel Block: Our block is reserved until Tuesday, April 17, 2018, or until it fills up.
The TAI rates are ONLY guaranteed for Tuesday, Wednesday, and Thursday nights.

About Hotel: Renaissance Chicago Downtown is a non-smoking hotel. Hotel check-in is 4 p.m., and check-out is noon. Room rates include access to in-room wireless Internet. Valet parking is $69 per day.

Reservations: Online: Click Here | Phone: +1 312-372-7200 (Ask for "TAI User Group block")

Please make your reservations as soon as possible. Rooms in the block are expected to fill up well before the cut-off date. Please be aware that those attendees unable to reserve rooms at The Renaissance Chicago Downtown will need to secure lodging and transportation to the meeting on their own.

TRANSPORTATION

Attendees are responsible for their transportation to and from the meeting. Transportation includes booking airline tickets and any shuttle service, rental car, Uber rides or taxis.

Chicago O'Hare (ORD) airport is located 18 miles from The Renaissance Downtown Chicago. Major airlines at ORD include Air Canada, American, Delta, Jet Blue, and United. Taxi fare is approximately $45 one-way from ORD to the hotel.

Chicago Midway (MDW) airport is located 12.1 miles from The Renaissance Downtown Chicago. Major airlines at MDW include Delta, Frontier, Porter, and Southwest. Taxi fare is approximately $30 one-way from MDW to the hotel.

Both airports have rental cars available from all the major carriers. However, reservations are recommended. Upon arrival at the hotel, public transportation is readily available to travel throughout the downtown area. Valet parking at the hotel is an additional $69 per day plus tax (subject to change). Please note that the hotel cannot accommodate oversized vehicles.

Airport Transportation Option: Go Airport Express charges $35 one way from O'Hare and $30 one way from Midway (prices subject to change). Advanced booking is required. Visit: www.goairportshuttle.com.

WEDNESDAY NIGHT WELCOME RECEPTION AT RENAISSANCE CHICAGO DOWNTOWN

The Wednesday evening welcome reception will be held at the Renaissance Chicago Downtown in the Urban Blue and Looking Glass Ballroom. This event is one of the many networking opportunities for attendees to connect with others in the industry.

THURSDAY NIGHT COCKTAIL & DINNER EVENT AT RIVER ROAST

The Thursday evening cocktail and dinner event will be held at River Roast, located at 315 N. Lasalle Street, Chicago, IL. The venue is less than a ten-minute walk from the hotel (directions included below). Please note transportation to and from the event will not be provided by TAI.

Directions to River Roast from Renaissance Chicago Downtown:

- Head west on W. Wacker Dr. towards N Dearborn St. (0.2 mi.)
- Turn right onto N. LaSalle Dr.
- Destination will be on the right

AGENDA

WEDNESDAY	THURSDAY	FRIDAY

8:00 a.m. – 9:00 a.m.
Breakfast & Registration

9:00 a.m. - 9:15 a.m.
Welcome & Opening Remarks

9:15 a.m. - 10:00 a.m.
Speaker - Reinsurer

10:00 a.m.- 10:30 a.m.
Refreshment Break

10:30 a.m. - 11:15 a.m.
What's New at TAI

11:15 a.m. - 12:00 p.m.
Speaker - Reinsurer

5:30 p.m. – 7:00 p.m.
Welcome Reception

8:00 a.m. – 9:00 a.m.
Breakfast & Registration

9:00 a.m. - 10:30 a.m.
Keynote Speaker

10:30 a.m. – 11:00 a.m.
Refreshment Break

11:00 a.m. - 12:15 p.m.
Breakout Sessions
details on next page

12:15 p.m. - 1:30 p.m.
Lunch

1:30 p.m. - 2:45 p.m.
Breakout Sessions
details on next page

2:45 p.m. - 3:15 p.m.
Refreshment Break

3:15 p.m. - 4:30 p.m.
InsurTech Panel

4:30 p.m. – 4:45 p.m.
Wrap-Up

6:00 p.m. – 10:00 p.m.
Cocktail & Dinner Event at River Roast

9:00 a.m. - 12:00 p.m.
Pre-scheduled Meetings with TAI Staff **

** Submit a request for a meeting with TAI staff through the registration system.

UG MORNING BREAKOUT DESCRIPTIONS:

THURSDAY MAY 10, 2018: 11:00 a.m. - 12:15 p.m.

Breakout #1 - Top FAQs from TAI Users & Basic System Training

Inspired by the launch of TAI's FAQ Blog Series, this session will answer the most frequently asked system questions from our users. We will touch on topics such as the basic setup of key reinsurance tables on the TAI .NET and Mainframe platforms; and outline the different ways to process reinsurance and claims. We will also consider the impact of updates and their downstream effect on the different screens within the TAI application. In addition, attendees will have the opportunity to ask about specific challenges they face within the system. The session is open to all system users.

Breakout #2 - How to Process Annuity Reinsurance with Ease on TAI

Discover how to use TAI Annuity, the platform designed to help clients process annuity business with ease. This session will deliver an overview of basic system processing and tools, plus demonstrate how the processing differs from that of life and health reinsurance. We will then take a more in-depth look at how annuity products flow through TAI and answer key questions including:

- How the reinsurance arrangement works
- How annuity-specific additional expense allowances, acquisition fees, commissions, etc. are handled
- How the transaction-based policy master extracts differ from a point-in-time policy snapshot
- How TAI handles roll-forward tracking

Breakout #3 - How Does TAI Protect Your Data? Plus the Must Know Data Security Trends for Insurance Professionals

The ever-changing world of information security requires professionals who work with data to stay on top of the latest trends, threats, and best practices that impact their day-to-day responsibilities. It is equally important to understand the data security protocols in place to protect the data that comprises the lifeblood of your reinsurance business.

Join this session to understand how TAI enforces data security to protect clients' data. Review the investigation and notification standards for cybersecurity events proposed by the NAIC's adoption of the Insurance Data Security Model Law. Then, discuss the latest security trends in the life insurance industry to help you start preparing for the future of data security.

Breakout #4 - Leveraging Artificial Intelligence and Machine Learning to Test the Accuracy of Treaty Data in TAI

The treaty is the single source of truth within the world of reinsurance. But how confident are you in the accuracy of the treaty data in your TAI system when stacked against the paper treaty? And more importantly, how easy is it for you to review your data and test for accuracy?

Conducting a thorough treaty review can reveal much about the health of reinsurance administration practices. However, it requires a substantial amount of time and resources, both of which are limited in our industry. Join us as we reveal best practices for conducting treaty reviews: what errors, exceptions and financial impact reviews can expose; and how artificial intelligence and machine learning can make this process more efficient.

UG AFTERNOON BREAKOUT DESCRIPTIONS:

THURSDAY MAY 10, 2018: 1:30 p.m. - 2:45 p.m.

Breakout #5 - Advanced System Training

Building on fundamental training provided by TAI during initial system installation and/or upgrade projects, this session will provide additional insight into effective online maintenance and batch system processing. The discussion will involve tips, tools, and tricks on complex functionality that even seasoned TAI administrators may find useful. In addition, attendees will have the opportunity to discuss specific processing problems they have experienced. This session is open to all system users.

Breakout #6 - TAI Upgrades: The Customer Journey

So, you're ready for an upgrade in the next 18 months? What should you expect? Join us for an in-depth look at the customer journey during a TAI upgrade. We will be sharing the steps we take to ensure you experience a successful upgrade, key learnings, and feedback from clients who have gone through the experience. Attendees can also participate in a Q&A with an experienced TAI upgrade programmer, business analyst, and project manager.

Breakout #7 - Improving Efficiency and Operational Controls with TAI's Claims Module

Are you currently leveraging all processing and reporting capabilities of TAI's Claims Module? Join this session to learn how using various components of the Claims Module on products including living and accelerated benefits, can improve efficiency and operational controls in your organization's claims processing. These components include the Claims EDI Extract, which we introduced in 2017 to streamline claims reporting and eliminate the need for paper notices. It also includes the new Claims Reimbursement Extract, which automates and enhances the tracking of collected claims. Finally, we will facilitate a discussion around the reporting needs and requirements of both ceding companies and reinsurers.

Breakout #8 - Product Deep Dive: CONNECTOR and INSIGHTS

In this session you will learn how to extract TAI data more efficiently with CONNECTOR and move beyond basic data analysis with INSIGHTS.

CONNECTOR is TAI's powerful data extract tool that allows you to pull information without the help or support of IT.

INSIGHTS is TAI's analytics tool that allows you to visualize and analyze data within the TAI Reinsurance System.

Join us for an in-depth exploration of how both self-service platforms can help you get more value from your TAI.NET system. Plus, see them in action as we take you through live demos.

HOW TO STAY UP-TO-DATE:

Don't miss out on the latest news as we count down to User Group 2018 in Chicago, Illinois. We'll email you with important updates on hotel and registration deadlines, know-before-you-go reminders, and the big reveal on this year's keynote! Subscribe to the TAI blog and follow us on LinkedIn for the latest from our team.

CONNECT WITH US: