



#TAIUG2019 | MAY 15-17
REGISTRATION GUIDE

IMPACTING THE INDUSTRY: PAST, PRESENT AND FUTURE

KIMPTON EPIC HOTEL
MIAMI, FL



30
YEARS

About TAI User Group

Impacting the Industry: Past, Present, and Future

The TAI User Group 2019 meeting, taking place this May at the Kimpton EPIC in Miami, FL, celebrates an important milestone: the meeting's 30th anniversary. This annual conference has played a significant role in connecting the professionals that are shaping our industry – past, present, and future.

What to expect?

An excellent program to help clients obtain maximum value from TAI software and services. Attendees will benefit from educational breakout sessions plus dynamic speakers and presenters. They will gain valuable insight from industry experts, learn about new TAI system enhancements firsthand, and take advantage of invaluable networking opportunities with over 150 industry professionals.

IMPORTANT DATES

Registration Opens on February 11, 2019

Reserve Hotel by April 15 (at 5pm EST), 2019

User Group Meeting takes place from May 15-17, 2019

* Note: We have a limited number of rooms at a discounted rate of \$239 USD per night, excluding taxes. The deadline to book your room is April 15, 2019, at 5pm EST, or as long as rooms last, whichever comes first. We recommend you make your reservation as soon as possible, as the block is expected to fill before the deadline date.

HOW TO REGISTER?

Registration is open February 11, 2019 - May 5, 2019.

STEP 1: Visit this link: [TAI User Group 2019 Registration](#).

STEP 2: Fill out the online registration form.

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 e-mail address you provide for registration will also be used for your schedule on the User Group app.

The registration system will enable you to:

- Pay with all major credit cards
- View breakout session descriptions
- Pre-schedule a meeting on Friday with TAI staff
- View the attendee list
- Print your personal agenda and receipts
- Log in and edit breakout session selections until May 5, 2019

Please contact us with any inquiries by e-mailing usergroup@taire.com.

Registration fees

- \$700 per attendee
- \$150 per guest (for evening social events on Wednesday and Thursday)

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.

THE USER GROUP CONFERENCE APP

For this year's User Group 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 and logging in with your registration e-mail, attendees can view the attendee list, access personalized schedules, receive important updates, participate in live polls, and much more.

How to Access the App on Your Mobile Device:

- Download the FREE Guidebook app from Apple, Google, or Amazon app stores
- Once installed, open the app, and go to "Find Guides" and find "Have a passphrase?"
- Type in the passphrase "taiug2019"
- Tap "open" to access the app

How to Access the App from Your Desktop

- Open your web browser and [visit this link](#)
- Type in the passphrase "taiug2019"
- Click "submit"

If you have any questions concerning the app, you can e-mail support@guidebook.com. 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: Kimpton EPIC

Address: 270 Biscayne Blvd Way, Miami, Florida 33131 USA. [Click here for map.](#)

Group Rate We have a limited number of rooms at a discounted rate of \$239 USD per night, excluding taxes. The deadline to book your room is April 15, 2019, at 5pm EST, or as long as rooms last, whichever comes first. We have contracted the discounted rate three nights pre- and post- User Group meeting (Saturday, May 11 – Sunday, May 19).

About the Hotel: About the Hotel: Kimpton EPIC is entirely non-smoking. Hotel check-in is 4 p.m. and check-out is 12pm. Room rates include access to in-room wireless Internet. Valet parking is \$27 per day and \$42 per night. The Kimpton EPIC offers a hosted nightly wine hour (from 5-6), complimentary coffee and tea daily (6am-10am), Espresso Cafecito Break (daily at 3:05pm), complimentary EPIC Eco-bicycles, and complimentary access to their 24-hour Fitness Center to all hotel guests.

Reservations: Online: [Click Here](#) (not available on mobile devices) | Group Code: EDF
| Phone: +1 800-546-7866 (Ask for "TAI User Group 2019")

Please make your hotel 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 Kimpton EPIC will need to secure lodging as well as local transportation to the meeting on their own. Finally, please note that the hotel requires cancellations be made 48 hours prior to check-in.

Amenities: Fitness Center ([click here](#)), Spa ([click here](#)), Rooftop Pool ([click here](#))

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 conventional taxis.

Miami International Airport (MIA) airport is located eight miles from the Kimpton EPIC. Taxi fare is approximately \$30 one-way from MIA to the hotel.

MIA has rental cars available from all the major carriers, but reservations are recommended. Valet parking at the hotel is an additional \$42 per night plus tax (subject to change). Please note that the hotel charges \$57 for oversized vehicles. Upon arrival at the hotel, public transportation is readily available for travel throughout the downtown area.

Airport Transportation Option:

Super Shuttle ([click here](#)) charges \$17 one way from the hotel to MIA per person in a shared ride with others headed in the same direction (prices subject to change). Reservation is needed.

WEDNESDAY NIGHT WELCOME RECEPTION AT THE KIMPTON EPIC

The Wednesday evening welcome reception will be held at the Kimpton EPIC. This event is one of the many industry networking opportunities for attendees.

THURSDAY EVENING CRUISE ON THE GRAND FLORIDIAN

The Thursday evening cocktail and dinner event will be held on the Grand Floridian cruise vessel, located on the west side of the Hyatt Regency (400 SE 2nd Avenue, Miami, FL 33131). The Hyatt dock is a short walk from the hotel (directions included below). Please note transportation to and from the event will not be provided by TAI.

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YEARS

AGENDA

WEDNESDAY, MAY 15TH

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

9:00 a.m. - 9:30 a.m.
Welcome & Opening
Remarks

9:30 a.m. – 10:00 a.m.
Reinsurer Speaker

10:00 a.m.- 10:30 a.m.
Reinsurer Speaker

10:30 a.m. – 10:45 a.m.
Refreshment Break

10:45 a.m. - 11:30 a.m.
What's New –
Introduction to
Reinsurance Services,
Software Updates

11:30 a.m. – 12:00 p.m.
Reinsurer Speaker

5:30 p.m. – 6:30 p.m.
Welcome Reception

THURSDAY, MAY 16TH

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.
Industry Speaker

4:30 p.m. – 4:45 p.m.
Wrap-Up & Closing
Statements

6:00 p.m. – 10:00 p.m.
Cocktail & Dinner Event
on the Grand Floridian

FRIDAY, MAY 17TH

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.



USER GROUP MORNING BREAKOUT DESCRIPTIONS:
THURSDAY MAY 16, 2019: 11:00 a.m. - 12:15 p.m.**Breakout #1 - Basic Training Session: Take Charge of Your System**

Learn how to use your TAI system to its full potential in this breakout session designed to cover fundamental user tips. This session is recommended for attendees using TAI software for five years or less. Get an understanding of basic reinsurance processing and functions, along with essential reinsurance tools including workbook and audit. We'll also cover data tools such as the Ad Hoc Query and Rate Import function and teach you how to use the TAI Rate Import Templates.

Get tips for working with your IT and Reinsurance Administration departments to backup or restore current production data in a testing environment, to perform clones on complex policies, and to use our IMEX (import/export) utilities to load data. Plus, see the difference between the TAI .NET and Mainframe platforms, and get control over how you test, interpret, and share your data. Before the session wraps up, you'll have an opportunity to ask questions and discuss specific challenges.

Breakout #2 - Big Data, Big Opportunity: Prepare for the Future of Insurance Data

Join this session for a data-driven view of our market that explores these burning questions:

- What impacts has data played in our past?
- What will our market look like 10-20 years from today?
- How can we position ourselves for success?

Explore the evolution of data through practical use cases, market changes, and essential industry studies. Discover how we are using historical product trends to predict future impacts on the market. Walk away with an overview of emerging trends and solutions, including the missing data points that will enable our industry to track them. Finally, obtain actionable advice on becoming nimbler as a market and operating from a proactive rather than reactive position.

Breakout #3 - Optimizing Operations: Best Practices in Reinsurance Administration

Join this session to find out which processes, tools, and resources we deem essential for reinsurance operations, based on over 10 years of consulting and outsourcing for the life reinsurance industry. We'll cover various ways of elevating your reinsurance operations with intricate blocks of business and complex arrangements.

Learn how we operate efficiently in validating existing infrastructure, processes, workflows, and controls, including how we proactively identify any inefficiencies or potential risks and simplify inefficient, outdated manual processes. Optimize your reinsurance operations with tips and best practices from our team of experts, SSAE18-certified methodologies, and proven resources.

Breakout #4 - Simplifying Annuity: How TAI Annuity Works

Process your annuity business easier, faster, and more accurately with TAI Annuity. Discover how to use the platform with an overview of basic system processing and tools, followed by a demonstration of how it differs from processing life reinsurance. Join this session for an in-depth look at how annuity products flow through TAI, and answer key questions including

- How do annuity reinsurance arrangements, including Fixed Index vs. Variable annuities, work?
- How are annuity-specific treaty terms (e.g., expenses, fees, and commissions) handled?
- How does the implementation of the annuity system work?
- How does annuity-specific reporting work for seriatim, settlement statement, fund detail, and roll forward?

You'll leave this session with a much deeper understanding of the TAI Annuity system.

USER GROUP AFTERNOON BREAKOUT DESCRIPTIONS:
THURSDAY MAY 16, 2018: 1:30 p.m. - 2:45 p.m.**Breakout #5 - Onboarding vs Over-Boarding: Training Approaches for Better Business Outcomes**

Your approach to training and onboarding new reinsurance employees directly impacts business outcomes. How can you ensure it leads to a positive impact? The answer is by incorporating competencies, also known as Knowledge, Skills, and Attitudes (KSAs). Join this session to hear from an experienced Adult Learning professional on how to craft an experience that incorporates competencies relevant to insurance and reinsurance professionals. Gain ideas, examples, and ways of attracting, onboarding, and ultimately retaining employees through creative learning and development tools specific to reinsurance.

Breakout #6 - Gear up for Your Software Upgrade

You'll learn the core steps for a successful upgrade, as well as key learnings and feedback from clients with firsthand experience. EDI and EDT results will be used to compare old and new software environments. You'll also gain an understanding of the timelines involved in moving from Mainframe to .NET and between versions of .NET. Finally, you'll have the chance to direct their questions to the TAI Project Manager and Senior Systems Analyst leading the session.

Breakout #7 - Advanced Training Session: Mastering Your System

Upgrade your skillset with tips on how to master your system direct from TAI analysts. Focusing on online maintenance and batch system processing, we'll give you the chance to learn from the first-hand experience of our experts. Obtain answers to common client support questions, and solutions to avoidable issues. Identify and learn to use lesser-known features that can help you become the most effective administrator possible.

All system users are welcome. Join us to build on your knowledge from initial installation training, upgrade training, or from the Basic Training session. Leave the session with a set of tools, tips, and expert tricks to deepen your understanding and enhance your system skills. Bring your questions or system challenges to ask our TAI analysts and share with fellow users.

Breakout #8 - Harnessing Artificial Intelligence (AI) for Treaty Risk Assessments

Discover how we use AI to assess treaty data and uncover the health of your reinsurance administration processes. Last year we shared the importance of reviewing and testing treaty data; the challenges associated with this process; and the technology we're using to make it more efficient. This year, we'll share the progress we've made in overcoming these challenges with AI.

See firsthand how we're harnessing the power of AI-driven treaty reviews to digitize, capture, and structure your paper treaty data to make it functional for a range of business processes. Discover how digitization unlocks a wealth of potential for deeper analysis while also uncovering the history, complexities, and discrepancies behind each term, field, or data point. Learn more about our leading-edge approach to innovation and discover how it can assess risks in your business.

HOW TO STAY UP-TO-DATE:

Don't miss out on the latest news as we count down to User Group 2019 in Miami, Florida. We'll e-mail you with important updates on hotel and registration deadlines and know-before-you-go reminders. [Subscribe to the TAI blog](#) and [follow us on LinkedIn](#) for the latest from our team.