

12/8/2025 - Monthly Carrier Advisory Minutes

Date

Dec 8, 2025

Participants

<ul style="list-style-type: none">• American Equity/Eagle Life - Lisa Cavaliere• Athene - Lana Nelson, Adam Test• Corebridge - Greg Phillips	<ul style="list-style-type: none">• F&G - Mindy Butler• Brighthouse Services - Josh Zinn• Mass Mutual - Lesley Williams• Pacific Life - Randi Gordon, Jay Garcia	<ul style="list-style-type: none">• Global Atlantic - Stephen Kilbon• Nationwide - Patti Elliott• Protective Life - Stephen Powell	<ul style="list-style-type: none">• Principal - Holly Gulling• Prudential - Megan Cahill, Danny Paternostro• iPipeline - Wendy Crane, Stephen Johnson,
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Discussion Topics & Notes

1. AiPEX (formally known as Connections)

a. **March 11-13, 2026, in Nashville**, marketing emails have gone out, Registration is Open!

i. Reception at Category 10!

b. AFFIRM Sessions

i. 2 Training sessions - Denise

ii. Roundtables

1. Breaking out into 3 parallel roundtables on 1st day

a. Distributors Roundtable - Led by Adam

b. Carriers Roundtable - Led by Wendy

c. BGA Roundtable - Led by Bobby

2. Then bringing all 3 together on day 2 for combined 2 hr. roundtable on last day

3. Solution providers will be involved as well

4. For the roundtables, we will have a few set topics that we'll cover to kick off conversations, slido, and open discussion for the group to bring up topics.

iii. If you have any topics, you want considered for the roundtable or for the training sessions, please send to Adam Ducorsky, Wendy Crane, or Denise Madigosky.

c. Question: Not sure on agenda, but is iPipeline considering a panel for industry forward movement and what you and your partners have accomplished so far?

i. Some sessions are still being finalized, some sponsors, such as Spark, may have a session like this or cover items. We will cover innovations throughout our sessions, so I'm sure you will see highlights of what we've done, but probably more of a focus of what's to come and how can we align better.

2. Roadmap Status Update

a. Currently in the process of getting everything finalized and approved for Q1 initiatives

b. Goal is to be able to review the update to roadmap for AFFIRM in our next advisory meeting, January 12th, 2026.

3. Open Discussion

a. OneView - Status getting carriers and distributors on board?


i. I don't have exact names off top of my head, but it is definitely picking up. Most distributors are signed up or waiting on carriers to get on board. Steven Johnson can get some updated information if needed.

ii. Pac Life and Athene - Looking to see impending adoptions and more of a firm list of OneView

Action items



Decisions

 Type /decision to add a new decision