

IDIS 2026 Annual Conference

Working Conference Agenda

October 12–14, 2026

Embassy Suites Atlanta at Centennial Olympic Park

DAY 1 — MONDAY, OCTOBER 12

Salon I Hallway / Ballroom Registration Area

2:00 PM — Registration and Check-In Open

Legacy Ballroom

2:30 PM — New Attendee Welcome Meeting

Welcome by Kurt

3:00 PM — Conference Welcome and Opening Announcements

Led by Kurt

- Presentation of the Colors and National Anthem
- Local color guard and national anthem performer to be confirmed
- Tentative contact: Major Ben Martinez Jr., Georgia State University
- Platinum and Gold Sponsor Recognition:
 - MassMutual
 - Principal
 - The Plus Group

3:45–4:30 PM — Opening Keynote: Ron Gold

Disability claimant

- Introduction by Rodney Mogen on behalf of MassMutual

4:45 PM — General Session Adjourns

5:30–7:30 PM+ — 80s Welcome Reception and Exhibitor Networking

Sponsored by Petersen International Underwriters

- 1980s costume contest
- Restaurant gift card awarded to the contest winner
- Heavy appetizers and beverages
- Music and entertainment provided by the DJ
- Networking with carriers, sponsors, exhibitors, and industry partners
- Exhibitor tables remain open during the reception

The official reception will conclude at approximately 7:30 PM, but attendees may continue networking and enjoying the music afterward.

DAY 2 — TUESDAY, OCTOBER 13

6:00–8:30 AM — Complimentary Embassy Suites Breakfast

Legacy Ballroom

8:30 AM — General Session Welcome

Led by Kurt

- Opening remarks
- Silver Sponsor Recognition:
 - The Standard
 - Assurity
 - Illinois Mutual

Each Silver Sponsor may be provided approximately three minutes for brief remarks.

8:45–9:30 AM — Carrier Innovation: Technology Advancements and Ease of Doing Business

A discussion about how disability insurance carriers are using technology, underwriting improvements, and process innovation to make it easier for brokers and clients to do business.

Moderator:

Jeff Kruger, Principal

Proposed Panelists:

- Josh Lubas, MassMutual
- Jeff Hannemann, Head Disability Income Underwriter, Principal
- Lisa, Illinois Mutual
- Mike Feltman, Director of Sales, Assurity
- Representative from The Standard — TBD
- Representatives from Ameritas and Guardian — Pending confirmation

Final panel participation will be confirmed based on carrier availability.

9:30–9:45 AM — Break with Exhibitors

Sponsored by Illinois Mutual

9:45 AM–12:00 PM — Carrier Speed-Dating Meetings

Attendees will be divided into eight groups and rotate through carrier and sponsor presentations.

- Eight tables and eight attendee groups
- Approximately 15 minutes per rotation
- Brief transition time between rotations
- All attendees will circulate through the sponsor tables
- Room placement and branding will be prioritized according to sponsorship level

Tentative Room Assignments:

- **Salon III:** MassMutual
- **Salon IV:** Principal, The Standard, Petersen International Underwriters, and Assurity
- **Salon V:** Guardian, Ameritas, and Illinois Mutual

MassMutual will receive a dedicated room with expanded branding as the premier sponsor.

Legacy Ballroom

12:00–1:30 PM — Luncheon and IDIS Recognition Program

Sponsored by Principal and The Plus Group

- Introduction of the new IDIS Board of Directors — Kurt
 - IDIS Awards Ceremony — Joe Pittman
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BREAKOUT SESSION ROUND 1

1:30–2:15 PM

Agent Breakout

The “How-To” Guide to Selling Disability Insurance

Presenters:

- Rodney Mogen
- Mike Sir

This session will cover practical ways to:

- Identify and prospect for disability insurance opportunities
- Position disability insurance with clients
- Present recommendations effectively
- Close cases
- Add disability insurance production to an existing practice

BGA Breakout

The Broker’s Broker Model

A discussion about building an effective broker-to-broker disability insurance practice and creating value for producing agents.

Host:

Mike Cogdall

Presenters:

- Cory Anderson
 - Brett O’Brien
 - Greyson Owens
 - Mike Cogdall
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BREAKOUT SESSION ROUND 2

2:15–3:00 PM

Agent Breakout

Business Owner Planning and GSI/MLDI Strategies

Presented by Principal's Advanced Solutions Team

The session will focus on disability insurance strategies for business owners, including:

- Business overhead expense planning
- Buy-sell and business succession needs
- Guaranteed Standard Issue opportunities
- Multi-Life Disability Insurance
- Advanced case design

Moderator:

Don Schamay

Proposed Presenter:

Jason Hollis, CPA/Attorney, Principal Advanced Solutions

Additional Principal presenters to be confirmed.

BGA Breakout

Running Your Practice: How to Build a Highly Effective BGA

Presented by The Plus Group

This session will explore:

- What a successful Broker General Agency looks like
- Building an effective BGA structure
- Recruiting and supporting producing brokers
- Improving operations and service
- Creating sustainable growth

Presenters and moderator to be confirmed in coordination with Kurt and The Plus Group.

Legacy Ballroom

3:00–3:15 PM — Break with Exhibitors

Sponsored by The Standard

3:15–4:00 PM — The State of Disability Insurance and Reinsurance

Sponsored by Assurity

An industry-level discussion examining current disability insurance trends, claims experience, pricing, product development, and the reinsurance marketplace.

Moderator:

Dan Skwire, Milliman

Panelists:

- Tim Adams, Munich Re
- Steve Woods, Gen Re
- Dan Skwire, Milliman

4:00–4:50 PM — Closing Keynote: Paul Kingsman

Olympic medalist, motivational speaker, and financial professional

Paul Kingsman will close the day's educational program with a message connecting elite performance, preparation, discipline, and professional success.

Introduction by:

George Wilkins

5:00 PM — General Sessions Adjourn

Attendees will have approximately 30 minutes to return to their rooms, change clothes, or prepare for the evening reception.

College Football Hall of Fame

5:30–7:30 PM — College Football Hall of Fame Reception

Sponsored by MassMutual

- Private reception
- Food and beverages
- Networking
- Access to College Football Hall of Fame exhibits and activities

Confirm whether the College Football Hall of Fame can display or project the MassMutual logo during the reception.

DAY 3 — WEDNESDAY, OCTOBER 14

6:00–8:30 AM — Complimentary Embassy Suites Breakfast

Legacy Ballroom

8:30–8:45 AM — Final Morning Welcome and Sponsor Recognition

- Welcome by Kurt
- Final sponsor acknowledgments
- Conference updates and announcements

8:45–9:30 AM — Closing Keynote: Ross Bernstein

Sports author and business speaker
Presentation based on *The Champion's Code*

Introduction by:

Cory Anderson

9:30–10:00 AM — Closing Remarks

Led by Kurt

- Final conference message
- Sponsor and attendee appreciation
- Preview of the 2027 IDIS Annual Conference

10:00 AM — Conference Adjourns