

# AGENDA

## DAY 1 • MONDAY, OCTOBER 9TH

1:00 - 3:30 PM	GENERAL REGISTRATION / CHECK-IN OPENS
3:30 - 4:00 PM	WELCOME / OPENING INTRODUCTIONS AND ANNOUNCEMENTS/ SPONSOR MESSAGES
4:00 - 4:50 PM	"INVESTMENT INTUITION: MIND-READING THE MARKETS" Theron Schaub - Magician, Mentalist & Entertainer
4:50 - 5:00 PM	WRAP-UP ANNOUNCEMENTS
5:00 - 6:30 PM	WELCOME RECEPTION WITH EXHIBITORS Sponsored by Petersen International Underwriters
6:30 PM	CARRIER DINNERS OR DINNER ON YOUR OWN

## DAY 2 • TUESDAY, OCTOBER 10TH

6:30 AM	YOGA! (Meet in Rines A)
8:00 - 9:00 AM	ROUNDTABLE BREAKFAST WITH SPONSORS
9:00 - 10:00 AM	"THE STATE OF THE DI INDUSTRY" Dan Skwire, FSA, MAAA - Principal & Consulting Actuary, Milliman
10:00 - 10:45 AM	"LTD AND IDI COMBO SALES PANEL" Moderated by Chris Couto -- Regional Sales Manager, Principal Financial Group Panelists: Bobby McSweeney, VP at The CIP Group; and Josh Potvin, DIA, DIF - Regional VP of Sales, Principal Financial Group
10:45 - 11:00 AM	MORNING BREAK WITH EXHIBITORS
11:00 - 11:45 AM	"HIGH INCOME, LOW FRICTION - GSI PANEL" Moderated by Robert Clark, GBDS, DIF, LACP, LTCP - Sales Vice President, PGT Panelists: Jill Frohardt - Second VP IDI Sales, The Standard; Branden Pierson - National Sales Leader (IDI), Unum; Josh Lubas, ALHC, CLTC - National Sales Manager MassMutual Strategic Distributors; and Derrick Pfau, DIA - West Coast Regional Vice President at Petersen International Underwriters
11:45 AM - 1:00 PM	AWARDS LUNCHEON
1:00 - 1:15 PM	BREAK WITH EXHIBITORS
1:15 - 1:45 PM	"WHEN IT HITS HOME: REAL LIFE CLAIMS STORIES" Presented by our homegrown talent: Christy Magorian (Assurity), Tyler Huff (Principal Financial Group), and Kurt Meyer (MGIS)
1:45 - 2:30 PM	"SUCCESS BY ASSOCIATION - TIPS & TOOLS TO HELP YOU CAPTURE MORE ASSOCIATION BUSINESS" John Ryan, Account Executive with Gallagher Health
2:30 - 3:15 PM	"TRIALS & TRIBULATIONS - LEGAL PITFALLS TO AVOID" Moderated by Maureen Kirschhofer, CLU, ChFC - Kirschhofer & Associates Panelists: Anna Maria Martin - Partner, Kantor & Kantor, LLP; and Gregory Denes - President at Gregory L. Denes, P.A.
3:15 - 3:30 PM	AFTERNOON BREAK WITH EXHIBITORS
3:30 - 4:30 PM	"HIGH-PERFORMANCE HABITS TO CRUSH YOUR GOALS AND REACH YOUR POTENTIAL" Ryan James Miller - Performance Coach, Business Consultant, Motivational Speaker, and Author
4:30 - 6:00 PM	RECEPTION WITH EXHIBITORS
6:00 PM	CARRIER DINNERS OR DINNER ON YOUR OWN

## DAY 3 • TUESDAY, OCTOBER 11TH

6:30 AM	GO FOR A RUN! (Meet in Lobby)
8:00 - 9:00 AM	BREAKFAST and JeopardDI (hosted by Courtney Wilson of Fortify Insurance)
9:00 - 9:50 AM	"BUILD A FOLLOWING ON LINKEDIN" Mando Sallavanti III, CFP, CLTC - SaaS's Financial Planner, MassMutual Greater Philadelphia
9:50 - 10:00 AM	BREAK
10:00 - 10:50 AM	"PRESENTING LIKE A PRO" Michael Sir, OneProtection
10:50 - 11:00 AM	2024 BOARD ELECTION/INSTALLATION AND CLOSING ANNOUNCEMENTS
11:00 AM	MEETING CONCLUDES