

IDIS ANNUAL CONFERENCE TENTATIVE AGENDA & ITINERARY

“The Power of Partnership”

DAY 1 – MONDAY, OCTOBER 11

11:00 a.m. to 2:00 p.m. – **Exhibitor Booth Setup**

12:00 p.m. to 2:30 p.m. – **Registration Opens**

2:30 p.m. to 3:15 p.m. – **Opening Session / 30 Second Introductions**

3:15 p.m. to 4:00 p.m. – [Faisa Stafford \(LifeHappens\)](#)

4:00 p.m. to 5:00 p.m. – **General Session: [Sheriff J.B. Smith](#) – “Laughter is Lawful”**

Sheriff J.B. Smith was continuously elected Sheriff of Smith County Texas from 1976-2012. He managed a department of 355 personnel and supervised over 1,000 prisoners. The Sheriff started looking for positive things that produce humor; that attitude adjustment evolved over 20 years into a program that has been presented hundreds of time across the country. Currently he travels the country entertaining and motivating audiences with his unique stories and experiences. Besides being a former sheriff and being a national speaker, he is a licensed Texas auctioneer and a connoisseur of Texas chili. He has appeared on NBC Dateline, ABC Prime-Time Live, the CBS Morning Show and the NBC Today Show. His presentation will have you laughing while delivering a worthy message.

5:00 p.m. to 6:30 p.m. – **Welcome Reception with Exhibitors**

6:30 p.m. – **Dinner on Your Own**

DAY 2 – TUESDAY, OCTOBER 12

7:30 a.m. to 8:30 a.m. – **Ongoing Registration & Breakfast with Exhibitors**

8:30 a.m. to 9:00 a.m. – **Business Session**

9:00 a.m. to 10 a.m. – **General Session: [Irwin Cohen \(Irwin Cohen Group\)](#) – “TBA” – More information to follow**

10:00 a.m. to 10:30 a.m. – **Break**

10:30 a.m. to 11:30 a.m. – **General Session: “IDI Underwriting Panel” -- Panelist Session featuring [Jeff Kruger \(Principal Financial Group\)](#), [Ammon Dixon \(Gen Re\)](#), and more! The topic of the session is going to be underwriting now and into the future. It will focus on the implementation of automated underwriting systems as well as the new scoring tools and other vendor provided tools to speed up and improve underwriting.**

11:30 a.m. to 12:30 p.m. – **Lunch**

12:30 p.m. to 1:30 p.m. – **Breakout Session # 1:** [Andra Grava \(The DI Center\)](#) – “**The Tech Savy Advisor**” – *Information will be shared on FinTech and InsurTech companies that can benefit agents with case design, case management, prospecting and practice management.*

12:30 p.m. to 1:30 p.m. – **Breakout Session # 1:** [Lisa Kruckeberg \(Principal\)](#) – “**Building DEI in the Insurance Industry**” – *This breakout session will focus on discussing ways to make our industry more diverse, equitable, and inclusive.*

1:30 p.m. to 1:45 p.m. – **Break**

1:45 p.m. to 2:45 p.m. – **Breakout Session # 2:** [Jed Poland \(DIBroker\)](#) – “**Prospecting in the Modern Age**” – *If you already have all the clients you want or need, then this presentation is not for you. Sales professionals across all industries agree that new business is the life-blood of any organization’s future success. Then why is it that so many financial advisors and producers still spend their days inefficiently “dialing for dollars” or get burnt out and ignore it all together? In this breakout session Jed will explore how the relationship between buyer and seller has changed over time and share different ways you can use this information to adapt and meet your next client more efficiently.*

1:45 p.m. to 2:45 p.m. – **Breakout Session # 2:** “**Current Sale, Marketing, & Underwriting Trends in Guaranteed Standard Issue (GSI)**” – *Panelist Session featuring [George Mandala \(MetLife\)](#), [Patty Ball \(Ohio National\)](#), [Lori Boggs \(Petersen International Underwriters\)](#), & more!.*

2:45 p.m. to 3 p.m. - **Break**

3:00 p.m. to 4:00 p.m. – **General Session:** [Diane Boyle \(NAIFA\)](#) – “**Politics & Policy in the Punchbowl**”
Like it or not, Congress shapes the way you do business. In this session you’ll learn the latest policies initiatives and their potential impacts on your business. Diane will also share the role of politics in the process and how you can educate and influence lawmakers into making more knowledgeable decisions.

4:00 p.m. to 5:00 p.m. – **Sponsor Spotlight (Tentative)**

5:00 p.m. to 6:00 p.m. – **Reception with Exhibitors**

6:00 p.m. – **Dinner on Your Own**

DAY 3 – WEDNESDAY, OCTOBER 13

7:00 a.m. to 8:00 a.m. – **Ongoing Registration & Breakfast with Exhibitors**

8:00 a.m. to 9:00 a.m. – **General Session:** [Scott Rider \(DIAM Spokesperson\)](#) “**TBA**” – *More information to follow*

9:00 a.m. to 9:15 a.m. – **Break**

9:15 a.m. to 10:15 a.m. – **Breakout #3:** [Brian Lauber CLU, ChFC \(The Standard\)](#) – “**Working in the Changing DI Distribution Landscape**”

The financial services and disability income distribution landscape is changing. The session will look at working with independent broker dealers, RIA's, and financial planning advisors, as well as new distribution outlets. Attendees will also learn how to approach and sell in these new and changing markets.

9:15 a.m. to 10:15 a.m. – **Breakout #3:** [Mike Sir \(OneProtection\)](#) – “**TBA**” – *More information to follow*

10:15 a.m. – 10:30 a.m. – **Break**

10:30 a.m. – 11:30 a.m. – **General Session:** [Bill Acheson \(The Body Language Expert\)](#)

Bill Acheson is an expert in nonverbal communication and for over 20 years has used his knowledge of body language to show professionals how to protect themselves with greater impact and interpret subconscious messages sent by others.

11:45 a.m. to 1:15 p.m. – **Awards Luncheon**

1:15 p.m. to 1:35 p.m. – **Meeting Closes**