

CONFERENCE SCHEDULE



SEPTEMBER 20-21, 2023

20 ... WEDNESDAY

9:00 A.M. - 10:30 A.M. **Past Chair Breakfast**
Invite Only
Location: 9th Floor

10:45 A.M. - 11:00 A.M. **Annual Membership Meeting**
Location: Summit Ballroom

11:00 A.M. - 12:00 P.M. Building an Employee
Compensation Philosophy &
Model for Your Agency - Marit
Peters, IIAT
Location: Summit Ballroom

12:15 P.M. - 1:30 P.M. **Lunch - Induction of PIIAC
Board of Directors**
Location: Summit Ballroom
Sponsor: Agents Service Corporation

1:45 P.M. - 2:45 P.M. **Breakout Sessions**

Marketing in the Digital Age: How
to Modernize Your Approach and
Drive Results - Joseph Cox, IIABA
Location: Peaks, 3rd Floor

Your Agency's Tech Stack -
Steve Anderson, Catalyit
Location: Cliffside, 3rd Floor

10 Key Provisions of Carrier
Contracts You Need to Know
About - Ashley Gold,
Schulman, LeRoy & Bennett,
P.C.
Location: 9th Floor

3:00 P.M. - 4:00 P.M. **Breakout Sessions**

Taking Advantage of Free
Marketing Resources from
Trusted Choice-
Joseph Cox, IIABA
Location: Peaks, 3rd Floor

What's Next - Tech Trends -
Steve Anderson, Catalyit
Location: Cliffside, 3rd Floor

3:00 P.M. - 4:00 P.M. 10 Key Provisions of Carrier
Contracts You Need to Know
About - Ashley Gold,
Schulman,
LeRoy & Bennett, P.C.
Location: 9th Floor

4:15 P.M. - 5:15 P.M. **Breakout Sessions**

Marketing in the Digital Age:
How to Modernize Your
Approach and Drive
Results - Joseph Cox, IIABA
Location: Peaks, 3rd Floor

Emerging Technology,
Insurance Exposures and
Agency E&O - Steve
Anderson, Catalyit
Location: Cliffside, 3rd Floor

Minimize Risk on Your
Website and Social Media -
Ashley Gold, Schulman, LeRoy &
Bennett, P.C.
Location: 9th Floor

6:00 P.M. - 7:00 P.M. **Cocktail Reception**
Location: Summit Ballroom

7:00 P.M. - 8:30 P.M. **Dinner**
Location: Summit Ballroom

[Access Agenda Online:](#)



DRESS CODE:
DURING CONFERENCE: BUSINESS
CASUAL
9/21 ANNUAL DINNER: BUSINESS
PROFESSIONAL/COCKTAIL ATTIRE

CONFERENCE SCHEDULE



SEPTEMBER 20-21, 2023

21 ... THURSDAY

8:30 A.M. - 9:15 A.M. **Breakfast with CO Insurance Commissioner - Mike Conway**
Location: Summit Ballroom
Sponsor: Capital Premium Financing

9:30 A.M. - 10:30 A.M. **Keynote Speaker - Powerful Everyday Opportunities to Persuade - Brian Ahearn, Influence PEOPLE**
Location: Summit Ballroom

10:45 A.M. - 12:00 P.M. **State of the Industry - Andrew Katz - MarshBerry**
Location: Summit Ballroom

12:00 P.M. - 1:15 P.M. **Lunch**
Location: Summit Ballroom

1:30 P.M. - 2:30 P.M. **Breakout Sessions**
Documenting Employment Actions - Audrey Sevalt, BBSI
Location: Peaks, 3rd Floor
Rethinking Virtual Assistants - Carey Wallace, Agency Focus
Location: Cliffside, 3rd Floor
Mergers & Acquisitions: Trends in Insurance Distribution - Mike Strakhov, Live Oak Bank
Location: 9th Floor

2:45 P.M. - 3:45 P.M. **Breakout Sessions**
Build Your Talent Bench with Succession Planning and Leadership Development - Audrey Sevalt, BBSI
Location: Peaks, 3rd Floor
Driving Agency Value through Innovation, Data and Planning for Perpetuation - Carey Wallace, Agency Focus
Location: Cliffside, 3rd Floor

2:45 P.M. - 3:45 P.M. cont.

4:00 P.M. - 5:00 P.M.

6:00 P.M. - 7:00 P.M.

7:00 P.M. - 9:00 P.M.

Mergers & Acquisitions: Trends in Insurance Distribution - Mike Strakhov, Live Oak Bank
Location: 9th Floor

Getting and Keeping Your Employees on a Path to Success: Career Development - Sarah Jorgensen, BBSI
Location: Peaks, 3rd Floor
How to Create a Profitable Agency and Understand Your Financials - Carey Wallace, Agency Focus
Location: Cliffside, 3rd Floor
Hard to Place Property - Martin Burlingame, AccessOne80
Location: 9th Floor

Cocktail Reception
Location: Summit Ballroom

Annual Dinner - Industry Awards
Speaker - Charles Symington - CEO of Big "I"
Location: Summit Ballroom
Sponsor: Vertafore

[Access Agenda Online:](#)



DRESS CODE:
DURING CONFERENCE: BUSINESS CASUAL
9/21 ANNUAL DINNER: BUSINESS PROFESSIONAL/COCKTAIL ATTIRE

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