

September 14, 2021



FORUM Agenda

7:00 a.m. - 8:00 a.m.	Registration, Breakfast & Networking with Sponsors		
8:00 a.m. - 8:10 a.m.	Welcome, Sponsor Spotlight, and Agenda Summary		
8:10 a.m. - 9:00 a.m.	Opening General Session Retirement Money & Emotions - Anthony Bartlett, Bartlett Wealth Management / Past President, Society of Financial Services Professionals (GA Ins. applied for)		
9:00 a.m. - 9:10 a.m.	Break with Sponsors and Vendors		
	<u>Agency Management</u>	<u>Group Benefits</u>	<u>Financial Services</u>
9:10 a.m. - 10:00 a.m.	How to Scale Your Agency - Scott Seigel, Beacon Sales Advisors	Brush Up on the Dental Market Panel (GA Ins. applied for)	Tax Basis Planning - Michael Burns, Scroggins & Burns, LLC (GA Ins. applied for)
10:00 a.m. - 10:10 a.m.	Break with Sponsors and Vendors		
10:10 a.m. - 11:00 a.m.	Benefit Strategies to Win - Sue Aucoin, TASC (GA Ins. applied for)	Benefits Enrollment in the Remote Working World - Andrew Forbes, The Cason Group (GA Ins. applied for)	Deferred Compensation - Blaine Laverick, Principal (GA Ins. applied for)
11:10 a.m. - 12:40 p.m.	Lunch General Session- Distortions, Delusions & Deviations, Edward Queen II - Emory University-Center for Ethics (GA Ins. applied for)		
12:50 p.m. - 1:40 p.m.	New Agent Panel - How to Bring In New Advisors Successfully	How to Create a Competative Group Benefits Program - Joel Pitt, Homestead (GA Ins. applied for)	Making the Most of Social Security - Tom Royer, Country Financial (GA Ins. applied for)
1:40 p.m. - 1:50 p.m.	Break with Sponsors and Vendors		
1:50 p.m. - 2:40 p.m.	Privacy/Security - Eleni Nikolas/ Jonathan Boston, IDX (GA Ins. applied for)	ICHRA Update - Annette Bechtold, One Digital (GA Ins. applied for)	Lloyds of London - When Most Say No, Why Do You Say Yes? Tom Petersen, Peterson International (GA Ins. applied for)
2:50 p.m. - 4:00 p.m.	General Session -Legislative Update- John Greene, NAHU-Senior Vice President of Government Affairs (GA Ins. applied for)		
4:10 p.m. - 4:20 p.m.	Conference Conclusion - Acknowledgements		

Exhibitor Booths Open