



Atlanta Benefits and Financial Services Forum Agenda

March 14, 2019

7:30 am - 1:00 pm	Registration		
7:30 am - 8:30 am	Continental Breakfast - Visit with Sponsors and Vendors		
8:40 am - 8:50 am	Welcome, Sponsor Spotlight, and Agenda Summary		
8:50 am - 9:40 am	<i>General Session -Matt Jones, "Life is a Miracle" 1 hr. GA Ins. Ethics applied for</i>		
9:40 am - 9:50 am	Break with Sponsors and Vendors		
9:50 am - 10:50 am	<u>Insurance</u> Ballroom F	<u>Agency Management</u> Ballroom D	<u>Financial Services</u> Ballroom C
	<i>Level Funding</i> Dan Meylan, National Sales Director, Allied National <small>1 hr GA Ins. Applied For</small>	<i>Technology Panel</i> Brent Simmons, Trustmark Voluntary Benefits Ashley Tipton, EaseCentral <small>1 hr GA Ins. Applied For</small>	<i>What Dead Celebrities Can Teach Us About Estate and Tax Planning</i> Jeff Scroggin, J.D., LL.M. Scroggin & Company <small>1 hr GA. Ins. Applied For</small>
10:50 am - 11:00 am	Break with Sponsors and Vendors		
11:00 am - 12:00 pm	<i>Reference Based Pricing & Direct Primary Care</i> Dan Meylan, National Sales Director, Allied National <small>1 hr GA. Ins. Applied For</small>	Agency Management Panel: Rob Peters, Executive Vice President, Pritchard & Jerden Bert Hene, Hene Health Eric Haglund, OneDigital Health & Benefits <small>1 hr GA Ins. Applied For</small>	<i>Strategic Practice Management</i> Anthony Bartlett, Bartlett Wealth Management <small>1 hr. GA. Ins. Applied For</small>
12:00 pm - 1:00 pm	Lunch General Session- Ballroom F "The Magic of Industry"		
1:05 pm - 2:05 pm	<i>Level Funded Plans/Compliance</i> Trey Tompkins, MBA, JD, President, Admin America <small>1 hr. GA Ins. Ethics Applied For</small>	Exit & Succession Planning for Insurance & Financial Services: Start Planning Now! Focus on Value Drivers! David Shavzin, Shavzin & Associates Maria Forbes, SHRBP <small>1 hr. GA. Ins. Applied For</small>	<i>Don't Go Broke in a Nursing Home</i> Don Quante, America's First Financial Corp. <small>1 hr. GA. Ins. Applied For</small>
2:10 pm - 2:20 pm	Break with Sponsors and Vendors		
2:25 pm - 3:25 pm	<i>Creative Solutions to Help Your Clients Protect Their Incomes</i> John Brady, Principal® Keith Mangrum, MGIS Lori Boggs, Petersen International <small>1 hr. GA. Ins. Applied For</small>	Exit & Succession Planning for Insurance & Financial Services: Understanding Valuation and the Transaction Process! Bob Tankesley, MBA, CPA, CFP®, Principal, Neri Capital Partners <small>1 hr. GA. Ins. Applied For</small>	Georgia Assembly Legislative Update Joshua McKoon, Chief of Staff & Deputy Insurance Commissioner <small>1 hr. GA Ins. Ethics Applied for</small>
3:30 pm - 4:30 pm	<i>General Session - Dr. Loe, Director of the Center for Professional Selling at KSU and Executive Director and founder of the National Collegiate Sales Competition, Kennesaw State University</i> <small>1 hr. GA. Ins. Applied For</small>		
4:30 pm - 4:40 pm	Conference Conclusion- Acknowledgements		

Exhibitor Booths Open