

2017 IAdCA Conference Agenda\*

Start	End	
<b>Wednesday, April 5, 2017 (Omni Scottsdale Resort and Spa at Montelucia)</b>		
4:00p	6:00p	<b>Early Registration</b> <i>(Valencia Foyer)</i>
6:00p	6:30p	<b>Attendee Informational Meeting</b> <i>IAdCA Board Introductions - Conference Information</i> <i>(Kasbah Patio)</i>
6:30p	8:00p	<b>Welcome Reception</b> <i>(Kasbah Patio)</i>
8:00p		<b>Dinner On Your Own</b> <i>(Find an old or new friend or a group for Dinner On Your Own )</i>
<b>Thursday, April 6, 2017 (Omni Scottsdale Resort and Spa at Montelucia)</b>		
6:30a	7:45a	<b>Registration and Breakfast</b> <i>(Valencia Foyer / Valencia Lawn)</i>
7:45a	8:00a	<b>Welcome and Opening Remarks – Kate Goldsmith, IAdCA President</b> <i>(Valencia Ballroom)</i>
8:00a	9:15a	<b>Keynote Speaker</b> <b>Joseph Jordan</b> <b>“Living a Life of Significance”</b> <i>(Valencia Ballroom)</i>
9:15a	9:30a	<b>Break and Vendor Visit</b> <i>(Valencia Foyer)</i>
9:30a	10:45	<b>General Session Speaker</b> <b>Rod Perkins</b> <b>ACLI Update</b> <i>(Valencia Ballroom)</i>
10:45	11:00	<b>Break and Vendor Visit</b> <i>(Valencia Foyer)</i>
11:00	12:15	<b>Department of Insurance Divisions</b> <b>David Bolton, Oregon Division of Financial Regulation</b> <i>(Valencia Ballroom)</i>

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12:15	1:30p	<b>Lunch</b> (Valencia Lawn)			
<b>Breakout Sessions</b>					
1:30p	2:30p	<b>Breakout Session</b> <u>Variable Insurance Product Marketing</u> Anthony Maher - FINRA	<b>Breakout Session</b> <u>Impact of the DOL Rule on Advertising</u> Rod Perkins – ACLI Callie Currin – Currin Compliance	<b>Breakout Session</b> <u>Advanced Review Issues: Things to Watch Out For, 3<sup>rd</sup> Party Lead Gen., Independent Marketing Organizations</u> Heidi Gabel – GamePlan Financial Gary Romo - Allianz	<b>Breakout Session</b> <u>Effective Communication Tips &amp; Tricks</u> Glenda Bean – Currin Compliance
2:30p	2:45p	<b>Break and Vendor Visit</b>			
2:45p	3:45p	<b>Breakout Session</b> <u>P&amp;C</u> Giovanna Frick – Thomson Reuters	<b>Breakout Session</b> <u>Mobile Advertising</u> Randa Zalman – Insurance Marketing Institute Mike Will – BrightPeak Financial Chris Lapp – BrightPeak Financial	<b>Breakout Session</b> <u>Creating a Compliant Marketing Piece – From Idea to Finished Product</u> Jason Montgomery – New York Life Kate Goldsmith – Western & Southern Financial Group	<b>Breakout Session</b> <u>New Advertising Compliance Regulations</u> CJ Rathbun – First Consulting
3:45p	4:00p	<b>Break and Vendor Visit</b>			
4:00p	5:00p	<b>Breakout Session</b> <u>Information Discussion / Roundtable</u> David Bolton – Oregon Division of Financial Regulation TBD - TBD	<b>Breakout Session</b> <u>Variable Insurance Product Marketing</u> Anthony Maher - FINRA	<b>Breakout Session</b> <u>Gifts and Rebates</u> Judith Villarreal – CoreCap Investments Kaycie Tyll – Currin Compliance	<b>Breakout Session</b> <u>Stories from the Trenches</u> Glenda Bean – Currin Compliance Gary Romo - Allianz
5:30p		<b>Thursday Dinners</b> (Meet in TBD)			

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## 2017 IAdCA Conference Agenda\*

Start	End	
<b>Friday, April 7, 2017 ( Omni Scottsdale Resort and Spa at Montelucia)</b>		
6:30a	8:00a	<b>Breakfast</b> <i>(Valencia Lawn)</i>
8:00a	8:05a	<b>Welcome Back</b> <b>Chairs of Education and Conference Committees</b> <i>(Valencia Ballroom)</i>
8:05a	9:15a	<b>General Session Speakers</b> <b>Randa Zalman – Insurance Marketing Institute</b> <b>Chris Lapp – BrightPeak Financial</b> <b>Social Media – Big Data</b> <i>(Valencia Ballroom)</i>
9:15a	9:30a	<b>Break and Vendor Visit</b> <i>(Valencia Foyer)</i>
9:30a	10:30	<b>General Session Speaker</b> <b>“ TBD ”</b> <i>(Valencia Ballroom)</i>
10:30	10:45	<b>Break and Vendor Visit</b> <i>(Valencia Foyer)</i>
10:45	11:45	<b>Questions and Answers</b> <i>(Valencia Ballroom)</i>
11:45	Noon	<b>Closing</b>

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