

2017 IAdCA Conference Agenda*

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

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

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5:30p		Thursday Dinners <i>(Meet in TBD)</i>
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Friday, April 7, 2017 (Omni Scottsdale Resort and Spa at Montelucia)		
6:30a	8:00a	Breakfast <i>(Valencia Lawn)</i>
8:00a	8:05a	Welcome Back Chairs of Education and Conference Committees <i>(Valencia Ballroom)</i>
8:05a	9:15a	General Session Speakers Randa Zalman – Insurance Marketing Institute Chris Lapp – BrightPeak Financial Social Media – Big Data <i>(Valencia Ballroom)</i>
9:15a	9:30a	Break and Vendor Visit <i>(Valencia Foyer)</i>
9:30a	10:30	General Session Speaker Jim Svoboda – Redstone Direct Mail Makeover <i>(Valencia Ballroom)</i>
10:30	10:45	Break and Vendor Visit <i>(Valencia Foyer)</i>
10:45	11:45	Questions and Answers <i>(Valencia Ballroom)</i>
11:45	Noon	Closing

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