



2020 Conference Agenda

Wednesday, April 22, 2020		
Time	Description	Location
4:30-5:30 p.m.	Early Registration	Gallery Runway, 6 th floor
5:30-6:00 p.m.	Attendee Informational Meeting IAdCA Board Introductions & Conference Information	Gallery Living Room, 6 th floor
6:00-7:30 p.m.	Welcome Reception	Gallery Living Room, 6 th floor
TBD	Dinner on Your Own Find an old or new friend or a group for Dinner on Your Own – Meet in lobby 8 th flr	

Thursday, April 23, 2020		
Time	Description	Location
7:00-8:15 a.m.	Registration and Breakfast	Gallery Runway and Living Room, 6 th floor
8:15-8:30 a.m.	Welcome and Opening Remarks <ul style="list-style-type: none"> Heidi Pemberton, TruChoice Financial Group, IAdCA President 	Gallery 1, 2, 3 – 6 th floor
8:30-9:45 a.m.	Regulator Panel <ul style="list-style-type: none"> John Bolton (OR), Paul Hansen (MN) Ned Gaines (WA), October Nickel (ID) 	Gallery 1, 2, 3 – 6 th floor
9:45-10:00 a.m.	Break & Vendor Visit	Gallery Living Room, 6 th floor
10:00 a.m. –12:00 p.m.	Regulator Round Robin	Gallery 1, 2, 3 – 6 th floor
12:00-12:15 p.m.	Vendor Visit	Gallery Living Room, 6 th floor
12:15-1:30 p.m.	Lunch	Gallery Living Room, 6 th floor
1:30-2:30 p.m.	Keynote: Data, Data Everywhere: Is Today's Hottest Career Tomorrow's Biggest Concern? <ul style="list-style-type: none"> Robert McGrath, U of New Hampshire 	Gallery 1, 2, 3 – 6 th floor
2:30-2:50 p.m.	Break & Vendor Visit	Gallery Living Room,

		6 th floor
Thursday, April 23, 2020 (continued)		
Breakout Sessions: 2:50-3:35 p.m.*		
Time	Description	Location
2:50-3:35 p.m.	Advertising Enforcement Actions (Health) <ul style="list-style-type: none"> Stephanie Pierce, Associate, Foley & Lardner LLP 	Gallery 1, 2, 3 – 6 th floor
	Advertising Enforcement Actions (Life) <ul style="list-style-type: none"> Melissa Piekarski, Senior Compliance Specialist, Allianz Life Insurance Company Chad Batterson, Vice President, Compliance, Athene USA 	Gallery 1, 2, 3 – 6 th floor
	Hands-on Advertising Review <ul style="list-style-type: none"> Tiffany MacLean, Compliance Professional, Penn Mutual Life Insurance Company Alexandra Merchlewitz, Marketing Coordinator, Pacific Life Insurance Company 	Gallery 1, 2, 3 – 6 th floor
3:35-3:45 p.m.	Break & Vendor Visit	Gallery Living Room, 6 th floor
Breakout Sessions: 3:45-4:30 p.m.*		
Time	Description	Location
3:45-4:30 p.m.	Social Influencers and Testimonials in Insurance Advertising <ul style="list-style-type: none"> Jeffrey Edelstein, Attorney, Manatt, Phelps & Phillips, LLP 	Gallery 1, 2, 3 – 6 th floor
	Producer Files/Regulator Requirements and Best Practices <ul style="list-style-type: none"> Roger Hayashi, Co-owner, Summit Compliance Group, LLC Gary Romo, Distribution Compliance Specialist, Allianz Life Insurance Company 	Gallery 1, 2, 3 – 6 th floor
	Field Generated Advertising (Including Rebating and Inducements) <ul style="list-style-type: none"> Derrick Vermillion, Chief Compliance Officer, Impact Partnership Cathy Vasilev, Chief Operating Officer/Senior Vice President, Red Oak Compliance Solutions 	Gallery 1, 2, 3 – 6 th floor
4:30-4:45 p.m.	Break & Vendor Visit	Gallery Living Room, 6 th floor
Breakout Sessions: 4:45-5:30 p.m.*		
Time	Description	Location
4:45-5:30 p.m.	DOL Rule/REG BI/NAIC Suitability <ul style="list-style-type: none"> Andrew Payne, VP and General Counsel, Creative One Paul Hansen, Chief Examiner, Minnesota Department of Commerce 	Gallery 1, 2, 3 – 6 th floor

	<ul style="list-style-type: none"> ▪ <i>Cynthia J. Borelli, Partner, Bressler, Amery & Ross, P.C.</i> ▪ <i>Mark D. Knoll, Managing Principal, Bressler, Amery & Ross, P.C.</i> 	
	<p>Aging into Medicare: Compliantly Marketing to Medicare Beneficiaries</p> <ul style="list-style-type: none"> ▪ <i>Melanie Worth, Compliance, Mutual of Omaha</i> ▪ <i>Naomi Irvin, Manager of Divisional Compliance, Blue Cross Blue Shield</i> 	Gallery 1, 2, 3 – 6 th floor
6:30 p.m.	<p>Dinner on Your Own</p> <p>Sign up for a dine-around with an IAdCA Board member for Dinner on Your Own – Meet in lobby 8th flr</p>	

Friday, April 24, 2020		
Time	Description	Location
7:00-8:00 a.m.	Breakfast	Gallery Living Room, 6 th floor
8:00-8:05 a.m.	Welcome Back	Gallery 1, 2, 3 – 6 th floor
8:05-9:15 a.m.	<p>Keynote: How to Build (or Enhance) an Effective Advertising Compliance Program</p> <ul style="list-style-type: none"> ▪ <i>LaSalle Vaughn, Head of Global Communications Compliance, Robinhood</i> 	Gallery 1, 2, 3 – 6 th floor
9:15-9:30 a.m.	Break & Vendor Visit	Gallery Living Room, 6 th floor
9:30-10:30 a.m.	<p>General Session Speaker: Ethics, Data Privacy & You</p> <ul style="list-style-type: none"> ▪ <i>Fred E. Karlinsky, Co-Chair, Insurance Regulatory & Transactions Practice, Greenberg Traurig, P.A.</i> ▪ <i>Eric Au, Associate, Drinker Biddle & Reath LLP</i> 	Gallery 1, 2, 3 – 6 th floor
10:30-10:45 a.m.	Break & Vendor Visit	Gallery Living Room, 6 th floor
10:45-11:45 a.m.	Questions & Answers	Gallery 1, 2, 3 – 6 th floor
11:45 a.m.-12:00 p.m.	Closing	