



2017 Soaring Eagle Symposium

Orlando, FL

Agenda



Saturday, June 24th, 2017

- **Pre-Session Breakouts: 9:00-10:45**
 - **“Medicare Sales Opportunity: Group Supplement Plans - Guaranteed Issue for Employees and/or Retirees”** - Jason McClellan
 - **“How Quaint! Cost Containment Tools That Actually Contain Costs!”**
 - Moderator: David Smith, EbenConcepts
 - Dane Rianhard, TriBridge Partners
 - Todd Heiserman, Teladoc
 - _____, HSA Bank

- **Main Session: 11:00-5:00**
 - **11:00-11:15: Welcome, Intros, Icebreaker**
 - Suzy & Committee

 - **11:15-12:00 “0 to 60: Ramping up Tech in the Non-Tech Benefits World”**
 - Veer Gidwaney, CEO Maxwell Health

 - **12:00-12:10: Break to Get Lunch** (*Lunch provided*)

 - **12:10-1:05: Behind-The-Scenes Update on D.C.** (*lunch speaker*)
 - Janet Trautwein, CEO NAHU

 - **1:05-1:25: Sponsor Round-Table Strategy Sessions** (*3 sessions x 5 min*)

 - **1:25-2:10: Marketing Wisdom for Brokers in 2017**
 - Jerimiah Desmarais, Agency Growth Academy

 - **2:15-2:45 “Secrets of the Shift Shapers”**
 - David Saltzman, Shift Shapers Podcast

 - **2:45-3:30: “Tapping Technology: Make the Client’s Life (and Yours) Simpler”**
 - Chad Schneider, Code SixFour
 - Kyle Reese, Employee Navigator
 - Tiffany Stiller, BenefitMall
 - Alan Katz, NextAgency

This agenda is subject to change.

- 3:30-4:05 **Round-Table Discussions***: (2 sessions x 10 minutes)

**If time permits, lead discussions such as:*

- Staffing Ideas: How to manage today's demanding employees?
- Carriers: how do we get a broker's attention span today?
- Your best technology tip?
- Best standout client service tip?

- 4:10-4:55 **Let Go To Grow**

- Doug White & Polly White, Authors & Whitestone Partners

- 4:55-5:00 **Close**

- Suzy Johnson & Reid Rasmussen

- **Reception** **5:00-6:00**

Cocktails & Networking