



# 2017 Soaring Eagle Symposium

## Orlando, FL

### Agenda



Saturday, June 24<sup>th</sup>, 2017

- **Pre-Session Breakouts: 9:30-10:45**
  - **“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