



Fall 2011 BANK/TASC Summit
September 12-13, 2011 JW Marriott Chicago

Hotel:	JW Marriott Chicago	To Register:
	151 West Adams Street	Visit PeerNetworks.MarshBerry.com
	Chicago, IL 60604	
	312-660-8222	Questions:
	www.JWMarriottChicago.com	Contact Jessica Stogran at 440-392-6558.

Summit Agenda

Sunday 09/11/2011

7:00p-9:00p	BANK/TASC Registration & Opening Reception (optional) Join us in the JW Marriott Lobby Bar to pick up your registration materials, enjoy drinks, appetizers and connect with MarshBerry staff and other BANK and TASC Partners.
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Monday 09/12/2011

7:30a-8:15a	Breakfast
8:30a-11:30a	Strategic Issues Groups The Strategic Issues Group (SIG) can be described as a “board of advisors”. Each BANK and TASC Partner is assigned to a SIG with other non-competing agencies and a professional facilitator. Agency owners who participate in the SIG share sales strategies in order to expand thinking, break paradigms and maximize learning from each other. The SIG is a “think tank” group, which is strategic in orientation and serves as a core peer group within which information can be exchanged, accountability implemented and improvement mandated.
11:45a-12:15p	Opening Presentation This session will kick off the fall summit by providing an overview of the membership, introducing new members, and discuss recent network developments.
12:15p-12:45p	Lunch
12:45p-2:00p	State of the Industry This state of the industry presentation will paint a picture of the challenges and opportunities that will present themselves in the upcoming year. Partners will receive valuable information about the current state of the marketplace as well as proprietary research documenting the best practices employed by high growth agencies. Special Thanks to First Insurance Funding for sponsoring the State of the Industry Lunch!
2:15p-5:15p	Strategic Issues Groups (see session description above)
6:00p-9:00p	Offsite SIG Dinners (optional) Enjoy an evening of networking and dining with the members of your Strategic Issues Group. Invitations with further details will be sent out closer to the summit date.

Tuesday 09/13/2011

7:00a-8:30a	<i>Advisory Council Breakfast (Advisory Council Members only)</i>
7:30a-8:30a	<i>Breakfast</i>
8:30a-9:30a	General Session: Is an agency captive right for your business? <i>With carriers reducing commissions and contingencies decreasing, has your agency considered starting an agency captive to invest in your future? Do you have questions on how an agency captive operates, how to set one up, or would you like to get a better understanding on what costs are associated with running a captive? This panel discussion will give perspectives from the agency captive owner, carrier, underwriter, and captive manager to help you decide if investing in an agency captive can greatly increase your agency net worth.</i>
9:45a-11:45a	<i>Strategic Issues Groups (see session description above)</i>
12:00p-1:30p	BANK Lunch and Roundtable Discussion <i>In order to focus on bank-owned agency issues and provide the most beneficial exchange of information, this roundtable discussion will consist of all BANK participants.</i>
12:00p-1:30p	TASC Lunch and Roundtable Discussion <i>In order to focus on organic growth and provide the most beneficial exchange of information, this roundtable discussion will consist of all TASC participants.</i>
1:45p-3:00p	<i>(select one)</i> Mentor Performance Group #1: Designing Your Agency's Competitive Advantage <i>For over 27 years Financial Institution Consulting Corporation (FICC) has provided perpetuation and compensation consulting services to banks. This unique experience has allowed FICC to create a successful life insurance based platform designed specifically for P&C agencies. This platform helps agencies</i> <i>--Enhance the value created for top client relationships while increasing revenue and retention.</i> <i>--Attract and retain top talent.</i> <i>--Accelerate agency growth organically.</i> <i>--Make acquisitions more frequently and profitably.</i> <i>Larry Chinn, JD, LLM and Scott Hinkle JD, CFP will showcase how FICC has helped agencies enhance their competitive advantage. Kevin S. Bogart, CPA, CPCU who is the President of Partner for TASC member agency Wood Gutmann & Bogart Insurance Brokers will provide a peer to peer perspective on how he and his agency are just scratching the surface utilizing these powerful resources.</i>
1:45p-3:00p	<i>(select one)</i> Mentor Performance Group #2: Social Media Victories: Real Businesses, Real Campaigns, Real Results. <i>Presented by Patrick Schwerdtfeger, author of "Web-ify your Business."</i> <i>The vast majority of business professionals spending time on Facebook and Twitter are just wasting time. For the most part, they're using unfocused and ineffective tactics that do nothing to attract new clients. Meanwhile, a few are using simple but powerful strategies to explode their businesses overnight. This powerful one-of-a-kind program analyzes specific tactics used by actual companies in real life situations. Patrick presents successful case studies where organizations have leveraged Twitter, LinkedIn, Facebook and YouTube to increase revenue and brand awareness. This session will deliver exciting ideas and proven marketing strategies.</i>
3:15p-5:15p	Strategic Issues Groups <i>(see session description above)</i>
5:30p-7:00p	Closing Reception <i>Join us for cocktails, hors d'oeuvres, and a final networking opportunity. Following the reception use this evening to enjoy the sites, sounds and tastes of Chicago.</i>