



Atlanta Benefits and Financial Services Forum Agenda



7:30 am - 1:00 pm	Registration		
7:30 am - 8:30 am	Continental Breakfast - Visit with Sponsors and Vendors		
8:40 am - 8:50 am	Welcome, Sponsor Spotlight, and Agenda Summary		
8:50 am - 9:40 am	General Session -Legislative Update - Ballroom F Brad Carver, Hall Booth Smith; - (GA Ins. Ethics, CFP - applied for)		
9:40 am - 10:00 am	Break with Sponsors and Vendors		
	<u>Legislative</u> Ballroom F	<u>Benefits Solutions</u> Ballroom D	<u>Financial Services</u> Ballroom C
10:00 am - 10:50 am	Greetings from the Hill-ReCAP - Annette Bechtold, One Digital; Trey Wise, Admin America (GA Ins., Ethics - applied for)	The Value of Medicare vs. Long Term Care Expenses - Keith Nabb, Affordable Medicare Solutions (GA Ins. - applied for)	Recent Developments in Tax and Estate Planning - Doug Duncan, Lefkoff Duncan Grimes and Miller- (GA Ins., CFP- applied for)
10:50 am - 11:10 am	Break with Sponsors and Vendors		
11:10 am - 12:00 pm	Measurement Madness: ACA Reporting Made Easy - Keith Hughes, Prime Pay (GA Ins. - applied for)	Financial Wellness / Cause Marketing - Lance Ledbetter, AMG Benefit Group (GA Ins. - applied for)	Incorporating Social Security into the Planning Process - Don Warnke, County Financial (GA Ins., CFP- applied for)
12:00 pm - 1:15 pm	Lunch General Session- Ballroom F <i>Top 10 Reasons Your Business Isn't Growing Fast Enough - Kristin Andree, Andree Consulting Group (GA Ins., CFP - applied for)</i>		
1:15 pm - 2:05 pm	Cures Act Update- Daniel "Trey" Tompkins, Admin America (GA Ins., Ethics- applied for)	Everything You Wanted to Know About PEOs and Were Afraid to Ask - Gene Fidell, Adams Keegan, Inc. (GA Ins. - applied for)	Crypto Currencies 101: What Advisors Need to Know-Duane Osborn, Regency Manning, Inc. (GA Ins., CFP- applied for)
2:05 pm - 2:25 pm	Break with Sponsors and Vendors		
2:25 pm - 3:15 pm	Mind Your Own Business, Jeff Morris, Insperity (GA Ins. - applied for)	Self-Funding & Stop Loss 101 - Michael Wahlstrom, Tokio Marine HCC (GA Ins. - applied for)	TBD -(GA Ins., CFP- to be applied for)
3:20 pm - 4:10 pm	General Session -Empowering People of All Abilities - Ballroom F Aimee Copeland, Aimee Copeland Foundation (GA Ins., CFP - applied for.)		
4:10 pm - 4:25 pm	Conference Conclusion - Acknowledgements		

Exhibitor Booths Open