

 THE COUNCIL

CFO CONFERENCE

VIRTUAL • MAY 10, 11 & 13, 2021

All times in EST.

MONDAY, MAY 10, 2021

2:45 p.m. – 3:00 p.m. **Conference into Zoom Meeting – Check Video, Audio Settings**

3:00 p.m. – 6:00 p.m. **CFO Smackdown**

6:00 p.m. – 6:30 p.m. **Virtual Networking Event**

A total of 3 continuing education credits may be awarded for participation in Day 1

TUESDAY, MAY 11, 2021

10:45 a.m. – 11:00 a.m. **Conference into Zoom Meeting – Check Video, Audio Settings**

11:00 a.m. – 5:00 p.m. **CFO Smackdown**

- **Guest Speakers – Shawn Halsey, Merrill Lynch, Bill Pomponi, Crowe LLP and Daniel Kusaila, Crowe LLP**

5:00 p.m. – 6:00 p.m. **Virtual Networking Event Presented by The Council's exclusive premium financing partner, First Insurance Funding**

Jim Miller, Chief Sales & Marketing Officer, First Insurance Funding

Ben Rubin, Chief Risk Officer, First Insurance Funding

Dana French, SVP, National Programs, First Insurance Funding

A total of 5.5 continuing education credits may be awarded for participation in Day 2

THURSDAY, MAY 13, 2021

10:45 a.m. – 11:00 a.m. **Conference into Remo Meeting – Check Video, Audio Settings**

11:00 a.m. – 12:00 p.m. **Federal and International Government Affairs Update with Q&A**

Joel Wood, SVP, Government Affairs, The Council of Insurance Agents & Brokers

Joel Kopperud, VP, Government Affairs, The Council of Insurance Agents & Brokers

Blaire Bartlett, Director, Government Affairs, The Council of Insurance Agents & Brokers

Vladimir Gololobov, VP, International, The Council of Insurance Agents & Brokers

12:00 p.m. – 12:15 p.m. **Break**

12:15 p.m. – 2:00 p.m. **CFO Working Group Roundtable – presented by members, topics throughout the day will include but not be limited to member requested topics below:**

- **Impacts of COVID-19 on finance departments**
 - **WFH financial impacts**
- **PPP Loans: accounting treatment and forgiveness**
- **Risk Capital**
- **IPO/SPAC**
- **Current Market Conditions**
- **Market projections & the economy**
- **Scorecards and metrics/KPIs**
- **Lease accounting**
- **Consolidating accounting operations**
- **Plan Fall CFO Working Group Program**

2:00 p.m. – 2:30 p.m. **Technology Update – Automation Strategies**
Nick Lozano, Director, Technology, The Council of Insurance Agents & Brokers

2:30 p.m. – 4:00 p.m. **CFO Roundtable Continued**

4:00 p.m. – 4:30 p.m. **Agency Management System User Breakouts**

- **Applied Epic**
- **Vertafore AMS360**

4:30 p.m. – 5:00 p.m. **Wrap up Discussion, Networking Opportunity, and Conference Adjourns**

A total of 6.5 continuing education credits may be awarded for participation in Day 3 of the program

National Registry of CPE Sponsors - Sponsor Number 104692

Group Delivery Method - Live