

# 2024 NE. INSURANCE LEADERS FORUM AGENDA

## THURSDAY, SEPTEMBER 26

9:00 AM CHECK-IN FOR PRE-CONFERENCE SESSIONS / COFFEE & JUICE

9:30 - 11:30 AM **OPTIONAL** PRE-CONFERENCE 'WARM-UP' SESSIONS

### TRACK ONE



9:30 - 11:30 AM "COMPREHENSIVE CLIENT ADVOCACY" -- 2 HOURS GENERAL CE

*Andrew Holt, Grassroots Advocacy Director for NAIFA*

This program is designed to help you improve as an advocate, have legislative successes, and strengthen democracy. Through proven lessons and expert videos, you will learn how to build an effective relationship with Congressional offices as well as their staff and best practices to further legislative objectives through Congress. PLEASE NOTE: This program is designed for NAIFA members but is open to NABIP members and non-members as well.

### TRACK TWO



9:30 - 10:30 AM "NEBRASKA LEGISLATIVE & SPECIAL SESSION UPDATE" -- 1 HOUR LIFE CE

*Matt Ottemann, Attorney with McGrath North Law Firm*

This session will discuss tax and incentive law changes that were passed earlier this year as well as proposals that were not passed during the Nebraska Legislative session. This will include the topics of key income tax, sales tax and new incentives. Additionally, we will discuss the summer's special session called by Governor Pillen focused on property tax relief.



10:30 - 11:30 AM "ESTATE PLANNING PRIOR TO THE SUNSET" -- 1 HOUR LIFE CE

*Ron Lee, Mutual of Omaha*

This program will offer an in-depth analysis of how recent legislative changes, particularly those from the Tax Cuts and Jobs Act (TCJA), impact estate and transfer taxes. Attendees will receive a comprehensive overview of federal gift and estate taxes, including the unified system and current exemptions.

11:30 AM - 1PM CHECK-IN / LUNCH WITH SPONSORS / EXHIBIT HALL OPEN

### 1:00 PM KICKOFF KEYNOTE



"LEADING THROUGH THE CHURN" **\*\*NO CE**

*Lt. Colonel Scott Mann, Green Beret, Leader, Storyteller, Actor, Author, Speaker*

This dynamic keynote will cover how to read human nature by "Getting below the Waterline"; how to repurpose struggle in the service of others through the "Generosity of Scars"; and how to "Leave Tracks" of deep legacy in your personal and professional life that will increase the relevance and relatability of everyone that joins in on this session.

### DAY ONE BREAKOUT SESSIONS



2:30 - 4:30 PM "THE POWER OF YOUR STORY IN HARD TIMES WORKSHOP" **\*\*NO CE**

*Lt. Colonel Scott Mann, Green Beret, Leader, Storyteller, Actor, Author, Speaker*

This 2-hour workshop will help you design and deliver your story for influence when times are challenging. This training illuminates and includes way to enhance retention and recruiting of members through the power of personal narrative.

2:30 - 3:30 PM "HEALTH SAVINGS ACCOUNTS, MEDICARE, & RETIREMENT " - 1 HR LIFE & HEALTH CE

*Ruste Pontenberg, Senior Vice President, UMB Healthcare Services*

This course is designed to educate health insurance agents on Health Savings Accounts (HSAs) and how they interact with retirement, turning 65 years old, and Medicare.

3:30 - 4:30 PM "HSA GROUPS: EMPLOYER & EMPLOYEE RESPONSIBILITIES " - 1 HR LIFE & HEALTH CE

*Ruste Pontenberg, Senior Vice President, UMB Healthcare Services*

This course is designed to educate brokers and human resource teams on Health Savings Account (HSA) compliance, origin of the compliance requirements, and the parties responsible for specific legal aspects of administering a group HSA program.

4:30 - 6:00 PM EXHIBIT HALL OPEN / WELCOME RECEPTION WITH SPONSORS

6:30 - 8:30 PM NAIFA LILI/DSA DINNER

6:30 - 9:30 PM AFTERPARTY - WELL & GOOD PATIO AT SCARLET HOTEL (HOSTED BY NABIP)

### DAY ONE CONCLUDES

# FRIDAY, SEPTEMBER 27

7:30 AM PRAYER BREAKFAST

7:30 AM CHECK-IN / EXHIBIT HALL / BREAKFAST WITH SPONSORS

## 9:00 AM KICKOFF KEYNOTE

### "LIAR LIAR, PANTS ON FIRE" - 1 HOUR ETHICS

*Traci Brown, Keynote Speaker, Author*

Knowing what's behind the polish of the fancy suit or P&L is vital to protect you, your company and your customers. Would you win a game of Two Truths and a Lie? In this fast paced keynote you'll learn how to use Traci's fraud prevention system to find the liars in today's headlines...and in your own life. In this fast-paced keynote, you'll discover how to use Traci's 9-Point Fraud Spotting System to separate the lies from the truth, so you don't innocently step into a business, life, or reputation-destroying event.

## 10:00 AM BREAKOUT SESSION

### "NABIP'S FOCUS ON CONSUMER HEALTHCARE" - 1 HOUR LIFE & HEALTH CE

*Eric Kohlsdorf, NABIP Immediate Past President*

This session will provide an overview of the current issues and initiatives that NABIP is focusing on. NABIP's efforts emphasize the importance of creating a healthcare system centered around the consumer. This program will cover the highlights of NABIP's efforts to advocate for a better healthcare system.

### "CAPITOL INSIGHTS: NAVIGATING THE LEGISLATIVE LANDSCAPE FOR LIFE INSURANCE & FINANCIAL SERVICES" - 1 HOUR LIFE & HEALTH CE

*Mike Hedge, NAIFA Government Relations*

With the legislative climate in Washington, DC, and across the country constantly evolving, staying informed is more critical than ever. This session will provide you with an insider's perspective on the latest policy developments and their potential impact on your business.

### "DEEP DIVE INTO ETHICAL BUSINESS PRACTICES" - 1 HOUR ETHICS CE

*Traci Brown, Keynote Speaker, Author*

The Deep Dive into Ethical Business Practices program is designed for business and insurance professionals seeking to enhance their understanding of ethical dilemmas and effective lie detection. Through a combination of interactive activities, video analysis, and practical exercises, this program offers participants actionable insights into recognizing and addressing dishonesty in various contexts.

## 11:00 AM BREAKOUT SESSION

### "PHARMACY FUTURES: NAVIGATING TRENDS, TECHNOLOGY & TRANSFORMATION" - 1 HOUR LIFE & HEALTH CE

*Nick Rogers, Medica*

The program will cover technological advancements such as AI and telepharmacy, the evolving roles of pharmacists and pharmacy technicians, and the impact of regulatory and policy changes on the industry.

### "ROADMAP TO A TRANSACTION" - 1 HOUR LIFE & HEALTH CE

*Brian Goodhart, Director M&A Advisory Services, Capstone*

This session will discuss the current state of the financial markets including interest rates, financial news, financial trends in M&A, private equity, venture capital and more. The balance of the program will be devoted to selling a business -- why do people sell, what are their motivations for divesting of their business, what does a good transaction process look like, and what is the role of their advisor during their transition exploration?

### "DEEP DIVE INTO ETHICAL BUSINESS PRACTICES : PART II" - 1 HOUR ETHICS CE

*Traci Brown, Keynote Speaker, Author*

## 12:00 PM CONFERENCE CONCLUDES

Please note: In addition to NE & IA insurance CE, most programs will also offer CFP, CPE, Legal & PACE CE, pending approval.

\*Traci Brown's ethics programs will NOT offer CFP CE, but will be filed for Ethics insurance, CPE, Legal & PACE.