

The IBC Study Group Agenda

Hosted by Schiff Executive Benefits (SEB)

Please note:

Except carriers, all IBC members and guests are asked to attend all sessions, limit devices, and stay for the duration of the meeting; IBC wants to always facilitate respect

Sunday, November 2

- 4:30pm - 6:30pm** Opening Reception – The Hotel Monteleone
- 7:00pm – Dinner** (Dine Arounds), The Pelican Club, Mr B's, GW Fins, and Galatoire's.

Monday, November 3

- 7:15am** Networking Breakfast
- 8:00am** The IBC Opening
- 8:15am** 2024 Industry Analysis and State of Market - Dylan Major and Preston Fulco The Pangburn Group
- 8:45am** Carrier Panel Discussion - The BOLI/COLI Market
- 9:30am** Illumine is Changing the “Game” – Eric Eklund & Brendan Costello, The Ridgeback Group
- 10:15am** Networking Break
- 10:30am** The Economy Today (Update) – Peter Ricchuti, Tulane AB Freeman Business School
- 11:00 am** The Consulting Market and What is Driving Business Within - Bud Schiff, Alvarez & Marsal
- 11:30 am** Healthcare and the HNW Plan - John Samuels, Wellworth
- 12:15pm** Networking Lunch
- 1:00pm** The Lightning Round: Interactive discussions about top retail trends and best revenue wins. Bring the biggest concerns and the biggest wins to help all of IBC
- 1:45pm** Premium Financing in Today's Environment - Nick Robb

2:30pm	Networking Break
2:45pm	Carrier Panel Discussion - Retail Solutions
3:30pm	Using AI to Accelerate the Life Insurance Business – Nick Bowman, Xcela
4:15pm	PPLI in the HNW and Institutional Space (panelist discussion) – Jay Judas Moderate (Panelists TBD)
5:15pm	The Jayne N. Schiff, CLU, ChFC, MSFS Memorial IBC Award
6:00 -8:00pm	Reception and Dinner – Mambo’s on Bourbon Street
8:45pm	Experience New Orleans - Preservation Hall Jazz Show (No Sports in Town)

Tuesday, November 4

7:15am	Networking Breakfast
8:00am	The State of Third-Party Distribution, Producer Groups, and Where to go? - Open Discussion about Succession Planning, Valuations, Mergers, Etc. – Cary Fry
8:30 am	Life Settlement Market Update – Jaime Mendelsohn, Ashar Group
9:00 am	Social Media Marketing on Steroids (Best Practices and No-No’s) - Pete Dziedzic & John Stamper
9:30 am	Networking Break
9:45 am	Working in the Sports/Entertainment HNW Space - Steve Dark, One Wealth Partners
10:15am	Loan Regime Split Dollar Administration – Marlon Muralles and Marshall LaMoyne, Pangburn
10:45am	Networking Break
11:00am	The EB Add-On – Mike Fulco
11:30am	The UN-Meeting (members only) The Nitty Gritty, Feedback, Input, Ideas, Complaints, The Future of the IBC & 2026 Plan
12:00pm	Meeting Adjourns, Departures