



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 1

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

Monday, November 2

- 7:15am Networking Breakfast
- 8:00am The IBC Opening
- 8:15am 2025/26 Industry Analysis and State of Market - Dylan Major and Preston Fulco The Pangburn Group
- 8:45am Carrier Panel Discussion - The BOLI/COLI Market (Guardian, Mass, PacLife,
- 9:30am The illustration “game” – Seth Wasserman, Three Points Insurance Designs
- 10:15am Networking Break
- 10:30am The Perfect Plan® – An Executive Benefits Overview (Matt Schiff)
- 11:00 am The Economy Today (Update) – Peter Ricchuti, Tulane AB Freeman Business School
- 11:30 am Keynote Speaker – Finding your market Edge (Eric Caisse – Csenge Advisory)
- 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 Carrier Panel Discussion - Retail Solutions (NLV, NYL, MassMutual, Guardian, JH)



- 2:30pm COLI/BOLI Producer Panel Discussion (What's Hot in each space) – Matt Schiff Host
- 3:15pm Networking Break
- 3:30pm Motive – Meet the Invisible Guest in your wealth-biased relationships – Joe Strazzeri
- 4:15pm PPLI in the HNW and Institutional Space (panelist discussion) – Eric Eklund Moderator
(Panelists John Gatesman, Dave Reynolds, Roberto Amoruso, Cory Bircher, Brad Barros)
- 5:30pm The Jayne N. Schiff, CLU, ChFC, MSFS Memorial IBC Award
- 6:30 - 9:30pm Reception and Dinner – Monteleone Alley Way (Jazz Music Included) – Sponsored by John Hancock

Tuesday, November 3

- 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. – Matt Schiff
- 8:30 am Life Settlement Market Update – Roc Capital? (Sponsor Spot)
- 9:00 am Technology Update – What you need to know to be current – Nick Bowman Xcela, AI
- 9:30 am Networking Break
- 9:45 am Innovative Charitable Giving - Reed Waldenmaier and Lynn Weirick
- 10:15am The Love Policy – Lori Friedman
- 10:45am Networking Break
- 11:00am Disability Insurance – GSI and how to add it to your existing clients - (Max Schmitz)
- 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