

MAC SUMMIT



The Missouri Agents Connection (MAC) Summit was designed to be beneficial to all agents, including those in management positions, producers and young agents. The amazing networking and learning opportunities are sure to benefit you and your agency. Additionally, this conference is led by nationally acclaimed presenters. This year, we've altered the schedule into a hybrid conference and we are offering multiple registration options to bring Missouri agents a safe, informative and connection-rich conference.

Visit www.moagent.org to register or use this registration form. Take advantage of the early bird discount and register by June 23, 2021.



missouri agents connection summit
July 19-22, 2021
◇◇◇◇◇◇◇◇◇◇

PLANNING COMMITTEES



MAC Summit Committee

Chair, Kyane Marble

Hawkins Insurance Group, Edina

Stacey Eickhorst

Luebbering Insurance Agency,
Jefferson City

Nick Layman

Smart Insurance Agency,
Marionville

Paul Schroeder

Schroeder Insurance Agency,
Union

Darren Smiley

Gallaher Insurance Agency,
Mexico

Matt Speight

Scott Agency, Montgomery City

Josh Stafford

Stafford & Stafford Insurance,
Harrisonville

Brooke Wilkens

CFM Insurance, Concordia

NExT Committee

Chair, Clare Zanger

First State Insurance Agency,
Hannibal

Past-Chair, Chase Brenizer

Hawkins Insurance Group, Edina

Chair-Elect, Grant Bowen

Custom Insurance Services,
Crystal City

Colt Atwood

Specialty Risk Mgmt, Joplin

Kevin Bull

Bull Insurance Agency, Lamar

Nick Layman

Smart Insurance Agency,
Marionville

Luke LeBlanc

Midwest Risk Partners, St. Peters

Ryan Sanders

Rich & Cartmill, Ozark

Christine Starr

UFG Insurance, Columbia, Ill.

GENERAL INFO



Margaritaville Lake Resort, 494 Tan Tar A Dr., Osage Beach, MO

Tucked away on the banks of the Lake of the Ozarks, Margaritaville Lake Resort, previously known as Tan-Tar-A Resort, is a refuge for endlessly fun living. Inspired by the lyrics and lifestyle of singer, songwriter and author Jimmy Buffett, the resort invites you to live it up on the lake. Tee off on two championship golf courses, or set out on a lake cruise with boat rentals at the resort's full-service marina. Flavors and cocktails play together to form a meal you won't soon forget at one of our eight restaurants and bars. Find your moment of zen at Windjammer Spa. Spend the day cooling off at Jolly Mon Indoor Water Park, or explore local trails on horseback. There's no better paradise than right here.

MAIA has a contracted room rate of \$129/night for a guest room. After June 22, 2021, the hotel will release all unreserved rooms.





Virtual Platform

While you attend the virtual portion, take time to look at the virtual exhibit booths, obtain the digital passport codes and enter into the prize drawings!

MAIA App

Be sure to download MAIA's app (MOAGENT) from the App Store or Google Play and watch for upcoming details. This app is intended for in-person use only and does NOT integrate with the virtual platform.

Conference Attire

Attire for the entire conference is business casual, except for the Partner Mixer and Installation Banquet, which are semiformal, and the opening night activities, which are casual.

Onsite Registration

The registration desk will be open 3 - 6 p.m. on Tuesday, July 20 and 8 a.m. - 6 p.m. on Wednesday, July 21.

Steps for Safety

The MAIA staff and the staff at Margaritaville Lake Resort take very seriously the health of our members. It is our top priority as we plan for the 2021 MAC Summit. Current safety precautions applied by the hotel include but are not limited to the following:

- Signage will be posted throughout public spaces regarding cleanliness, social distancing and hand hygiene.
- Hand sanitizer stations will be prevalent at high traffic customer touch points throughout the property, including meeting areas.
- Meeting rooms will be cleaned and sanitized after each meeting. Frequently touched surfaces will be cleaned and disinfected as much as possible.
- EPA approved cleaning and disinfecting agents that kill the COVID-19 virus will be used throughout the property.
- When reporting to work, associates will receive a wellness check to include a noninvasive temperature check and a screening questionnaire.
- Face masks for any guest-facing hotel associates are currently considered part of the resort associates' uniforms, with exceptions made for associates' well-being while working outdoors. Gloves will be worn by associates completing specific job functions.

Masks & Hand Sanitizer

Attendees are encouraged to wear face masks if this makes them more comfortable. Masks and hand sanitizer will be available, or you can bring your own.

Reminders

There will be health, hygiene and social distancing reminders throughout MAIA event space, with reminders to wash hands and use hand sanitizer frequently. Hand sanitizer will be located at each place setting during general sessions. Sanitization stations are available throughout public spaces.

Seating Arrangements

During the sessions and meal functions, ample space to social distance will be available.

CONFERENCE AGENDA

Monday, July 19

VIRTUAL

9 - 11 am

How to Negotiate with Your Carriers

Chris Burand, Burand & Associates, LLC



By understanding the carriers' business situation, you can craft win-win negotiations. To understand their situation, agents must possess a deep understanding of the carrier, especially their financials so you can learn what is important to that specific company. Understanding, learning and practicing how to negotiate with the individual representing the carrier, specific to their personal situation and their company's overall situation, are also important to successful negotiations. In this presentation, Chris will cover how the exact conversations and actions should be scripted and examples of what those scripts are.

1 - 3 pm

Buy or Die: Businesses Without Cyber and D&O are Dead Meat

Kevin Amrhein, FISCE



An uncovered cyber or D&O liability claim can kill a small business...easily. Yet, many small business insureds have little understanding of these insurance products. This course provides tons of examples designed to assist agents with overcoming common objections from insureds. *(Approved for 2 p-c CE credits in Mo. & Kan.)*

3 -5 pm

Contractual Risk Transfer, Additional Insureds and Certificates of Insurance

Chris Boggs, IIABA



Your construction insureds enter into contracts almost daily. Do the contractual risk transfer (CRT) and additional insured (AI) requirements generally found in those contracts create a fair and equitable business relationship between the upper tier contractor and your lower-tier insured? What are the goals of CRT and AI status? Should you push back against these requirements or go on about your day and not worry about what you just gave up? *(Approved for 2 p-c CE credits in Mo. & Kan.)*

Tuesday, July 20

VIRTUAL

8 - 9 am

Producer Hiring and Management

Chris Burand, Burand & Associates, LLC



Given that producers are the number one cost to an agency and the only way most independent agencies can materially grow excluding what is now extremely expensive acquisitions, producers are the most expensive investment agencies make. This presentation covers how to hire, develop, train and manage producers if an agency's goal is true business success. Attendees learn about producer contracts, compensation, compliance, hiring, and expectations.

9 - 11 am

Named Insureds: Who Should Be, Who Can Be and Who Shouldn't Be

Chris Boggs, IIABA



Before any claim is paid, status as an "insured" must exist. Is the person or entity suffering or causing loss, injury or damage an insured? If the answer is "no," there is no need to go any further. If "insured" status does not exist, all your hard work is wasted; no one will ever find out how good you are at designing coverage - because you messed up at the beginning. If you mess this up, you will have a ticked off insured and maybe an E&O claim you never expected. You have to get this one detail - the named insured - correct. *(Approved for 2 p-c CE credits in Mo. & Kan.)*

Tuesday, July 20

IN-PERSON

4:30 - 6 pm

Welcome Reception Honoring First-Time Attendees (Casual)

All attendees are invited to this reception honoring first-time attendees. Members of the board and committees will be there to greet first-time attendees, introduce them to other attendees and make them feel welcome.

6 - 8 pm

Optional Cornhole Tournament (Casual)

Optional cornhole tournament hosted by the Young Agents at Margaritaville (includes beer and pizza). Teams of two (if you do not have a pairing request, we will pair you with someone). **Limited space available, first-come, first-served.**

Wednesday, July 21

IN-PERSON

9 am - 2 pm

Optional Golf Tournament

Our optional golf tournament includes box lunches and will be held at The Oaks, one of Margaritaville's signature courses. The 18-hole, par 71 championship course boasts tree-lined fairways, rolling hills and breathtaking vistas of the Lake of the Ozarks. All registrants can compete in the tournament, which is an 18-hole scramble.

4 - 6 pm

Partner Mixer (Semiformal)

An opportunity for agents to socialize with MAIA's partners and gain knowledge about their products. Appetizers and drinks will be available during the two-hour mixer showcasing MAIA's many valued partners.

6 - 9 pm

Awards and Installation Banquet (Semiformal)

9 - 11 pm

Post-Banquet Party

Thursday, July 22

IN-PERSON

7:30 - 8 am

Breakfast

8 - 9 am

Eggs & Issues Legislative Panel

MAIA CEO Matt Barton

This is your chance to get information right from the source. This Q&A session gives you access to MAIA CEO Matt Barton and a panel of Missouri legislators including Sen. Paul Wieland, Rep. John Wiemann and Rep. Steve Butz. They will address questions on regulatory and legislative issues affecting the insurance industry today.

(Approved for 1 ethics CE credit in Mo. & Kan.)

9 - 10 am

2021 Trends: Management & Operations

Join us for in-depth conversations with industry leaders discussing how operations and management have changed and adapted in 2021.

JULY 19-22, 2021
MARGARITAVILLE
LAKE RESORT
OSAGE BEACH



Register online at www.moagent.org/MACS.

Name & Designation(s) _____ Badge name _____

Spouse's Name (if registering for conference) _____

Phone _____ Date of Birth _____ E-Mail _____

Agency/Company _____ Title _____

Address _____ City/State/Zip _____

Home state for CE filing: Missouri Kansas | Please check any of the following that apply: This is my first MAC Summit

I am: Agency Owner Agency Mgr. Producer Acct. Mgr. CSR Wholesaler Co. Rep. Vendor Other: _____

FULL REGISTRATION	QTY	MEMBER		NON.	TOTAL
		BY 6/23	AFTER 6/23		
FULL Conference Registration Includes virtual sessions, virtual exhibit hall, in-person sessions, meals and social events listed on the agenda. <i>Does not include golf or cornhole tournament.</i>		\$225	\$275	\$450	
YOUNG AGENTS Conference Registration (Retail agents only 40 & under) Includes virtual sessions, virtual exhibit hall, in-person sessions, meals and social events listed on the agenda. <i>Does not include golf or cornhole tournament.</i>		\$150	\$185	\$300	
PARTIAL REGISTRATION	QTY	MEMBER		NON.	TOTAL
In-Person Conference Registration Includes meals, in-person sessions and social events on the agenda. <i>Does not include golf or cornhole tournament.</i>		\$175	\$225	\$350	
Online ONLY Conference Registration Includes virtual sessions and virtual exhibit hall.		\$75		\$150	
Spouse In-Person Registration Includes meals, in-person sessions and social events listed on the agenda. <i>Does not include golf or cornhole tournament.</i>		\$75	\$100	\$150	
OPTIONAL ITEMS	QTY	MEMBER		NON.	TOTAL
Cornhole Tournament Optional cornhole tournament scheduled at Margaritaville on Tues. 6 - 8 p.m. (includes beer and pizza). Teams of two (if you do not have a specific pairing request, we will pair you with someone). Limited space available, first-come, first-served. <i>Please pair me with:</i> _____		\$10			
Golf Tournament at The Oaks Available to registered conference attendees only; includes lunch. After July 1, no golf refunds will be made and registrations will be accepted on a space-available basis. Tournament begins at 9 a.m. on Wed. and is a four-person scramble. <i>Average 18-hole score: _____ Please pair me with:</i> _____		\$90			
Virtual Exhibit Booth Includes a virtual booth on the virtual platform (virtual booths will not be staffed; no need to register an individual to staff the booth).		\$75	\$100	\$125	
Total Enclosed					\$

PAYMENT: Check (payable to MAIA) or VISA MC AmEx Discover Card No. _____

Card Verification Number _____ Exp. Date _____ Billing Address _____

Cardholder Name and Signature _____

CANCELLATION POLICY: Attendee - Full or in person: You will receive a 90% refund if cancellation is received in writing at least 5 working days before the event; a 75% refund will be given if notice is received fewer than 5 working days before the event. No refund will be given if you do not notify us before the start of event. Attendee - Virtual: You will receive a 90% refund if cancellation is received in writing on or before July 9, 2021; no refund given if you do not notify us before July 9, 2021. Note: There is a different cancellation policy for exhibit booths, which can be found on our website.

HOTEL: Contact Margaritaville Lake Resort (494 Tan Tar A Drive, Osage Beach, MO) at 800-826-8272 by June 22, 2021. Say you are with the Missouri Association of Insurance Agents to receive our room rate of \$129/night for a guest room. After June 22, 2021 the hotel will release all unreserved rooms. Check-in is 4 p.m. and check-out is 11 a.m.

ADD'L ACCOMMODATIONS: If you need accommodations or have special dietary requirements, please contact MAIA immediately following registration.

Return with payment to: maia@moagent.org, fax: 573-893-3708, or 3315 Emerald Lane, Jefferson City, MO 65109

Questions? Visit www.moagent.org/MACS, email maia@moagent.org or call 573-893-4301

Speakers

Kevin**AMRHEIN** CIC



Kevin is president of the Florida Insurance School of Continuing Education (FISCE) and the CE Partnership. He started his insurance career as a marketing intern before pounding the pavement as a commercial lines agent in Orlando, FL. He is a National Faculty member for the National Alliance for Insurance Education and Research's CIC and CISR programs.

As an industry journalist, his articles have appeared in a variety of trade publications. His insurance television career, short-lived but quite glorious, once saw him serve as the expert adviser on an insurance-themed infomercial (yes- you read that correctly).

Kevin is a graduate of the University of Central Florida. His first teaching gig was as a golf instructor where he was frequently kicked off driving ranges for giving free lessons.

Chris**BOGGS** CPCU, ARM, ALCM, LPCS, AAI, APA, CWCA, CRIS, AINS

Christopher J. Boggs is the executive director of risk management and education with the IIABA. He joined the Big "I" team in November 2016. His current duties involve providing errors and omissions risk management programs, researching, writing, and teaching property and casualty insurance coverages and concepts to E&O insureds, Big "I" members and others in the industry.

During his nearly 30-year insurance career, Boggs has authored nearly 1,000 insurance and risk management-related articles on a wide range of topics as diverse as credit default swaps, the MCS-90 and enterprise risk management. Additionally, Boggs has written 15 insurance and risk management books.



Chris**BURAND**



Chris Burand is president and owner of Burand & Associates, LLC, a management consulting firm specializing in the property-casualty insurance industry. Chris is recognized as a leading consultant for agency valuations, producer compensation plans, and E&O carrier approved E&O procedure reviews. He also provides the acclaimed Contingency Contract Analysis[®] service and has the largest database and knowledge of contingency contracts in the insurance industry.

Chris's insurance career began in 1987 as a company underwriter and marketing representative. He established Burand & Associates in 1992. Since then, he has been a featured speaker across the continent for more than 400 seminars and educational programs. He writes a monthly column for the Insurance Journal, has published a book of E&O tips, and has been a monthly agency management columnist for 25 years for various publications. His articles have appeared in Rough Notes, The National Underwriter, A.M. Best, Insurance Thought Leadership, and many regional insurance publications. His articles have been published more than 500 times. He also publishes Burand's Insurance Agency Adviser for independent insurance agents.

Chris is a department head for the IIABA's Virtual University. He's an approved E&O auditor for Utica, Westport, and other E&O carriers. Chris is a Certified Business Appraiser.

We thank the following sponsors for their generous support of the
2021 Missouri Agents Connection Summit.

DIAMOND

Missouri Employers Mutual • Progressive • CFM Insurance

PLATINUM

Missouri Rural Services Corp. • UFG Insurance • Barton Mutual Insurance
Cameron Mutual • Nationwide

GOLD

Columbia Insurance Group • EMC Insurance • Arlington/Roe • Continental Western Group
Capital Premium Financing • Markel • Acuity • West Bend Mutual Insurance • Travelers Insurance
Keystone • Grinnell Mutual • BMI Company, Inc. • Liberty Mutual/Safeco • AmWINS Group, Inc.
NCMIC Finance Corporation

SILVER

Berkshire Hathaway GUARD Insurance Cos. • Valley Insurance Agency Alliance • Leavitt Group
SECURA Insurance • RT Specialty • JM Wilson • HawkSoft, Inc. • Stonetrust Workers' Compensation
Madison Mutual Insurance Co. • UIG • FCCI Insurance Group • Southern Pioneer Insurance
BankDirect Capital Finance • Accident Fund Insurance Co. of America • C N A