

## 2017 POWER of 3 WORKSHOP AGENDA

Workshop Dates: April 18 – 20 2017

Hotel Monteleone 214 Royal St, New Orleans, LA 70130

### Tuesday, April 18, 2017

5:30pm – 6:30pm Welcome Cocktail Reception  
(Reception Co-sponsors: *Lincoln Financial Group and Ameritas*)

### Wednesday, April 19, 2017

#### Expertise – Expanding Your Knowledge and Insight – Exploring Industry Best Practices

7:15am – 8:00am Registration and Breakfast (*Breakfast sponsor: Millennium Trust*)

8:00am – 9:30am Current Developments (Brian Furgala)

9:30am – 9:40am **Message from Sponsor: Millennium Trust**

9:40am – 9:50am Break

9:50am – 11:30am Current Developments (Brian Furgala)

11:30am – 11:40am **Message from Sponsor: Ameritas**

11:40am – 11:50am Break

11:50am – 12 noon **Message from Sponsor: Lincoln Financial Group**

12:00noon – 1:00pm Lunch (*Lunch sponsor: Colonial Surety*)

1:00pm – 1:50pm Current Developments (Brian Furgala)

1:50pm – 2:00pm **Message from Sponsor: Colonial Surety**

2:00pm – 3:15pm It's A Whole New World: Recruiting, Retaining and Managing the Virtual Workforce (Adam Pozek)

3:15pm – 3:30pm Break

3:30pm – 3:40pm **Message from Sponsor: ftwilliam**

3:40pm – 5:00pm Using the Power of Story to Attract and Retain Clients and Employees (Sarah Simoneaux)

6:00pm Dine Around New Orleans (optional group event)

**Thursday, April 20, 2017**

**Day 2: Implementation – Combining Expertise and Insight for Real World Application**

7:30am – 8:15am Breakfast

8:15am – 10:00am Keeping Your Clients' Plans Compliant\* – Problem Solving: Case Studies  
(Brian, Sarah, Adam)

10:00am – 10:10am **Message from Sponsor: Penchecks**

10:10am – 10:20am Break

10:20am – 12:50pm Keeping Your Client's Plans Compliant\* – continued

12:50pm – 1:00pm Closing remarks

*\*Thursday sessions will include ethics case studies that qualify for 2 hours of Ethics CPE*