

Wednesday, April 9

Noon – 1:00 pm **Networking Lunch**

1:00 – 1:30 pm **Welcome & Introductions**

1:30 – 3:15 pm **Retention & Optimization of Service Teams**

Retention remains a critical measure of success in brokerage firms, yet resource modeling and service team structures continue to evolve with shifting market dynamics. This focused peer-share discussion will provide an opportunity for attendees to share and learn from one another's experiences while exploring strategies for optimizing performance.

3:15 – 3:30 pm **Break**

3:30 – 4:30 pm **The Evolving Role of the CIO & Technology**

Kate Bang, USI

A CIAB member will share first-hand experiences in digital transformation to help COOs navigate ongoing change by focusing on best practices for mobilizing teams toward technology adoption and how the role of the agency CIO has evolved in recent years.

4:30 – 5:00 pm **Legislative & Political Update**

The Council's Government Affairs team will present a legislative and political update, focusing on key policy issues that impact brokerage firms. This briefing will equip attendees with the knowledge needed to stay ahead of regulatory and legislative developments affecting the industry.

6:00 PM **Working Group Dinner**

Succotash Prime Washington D.C.
915 F STREET NW (9TH AND F STREET)

Thursday, April 10

8:30 – 9:00 am **Breakfast**

9:00 – 10:00 am **Insights on Brokerage Marketing Tech**

Justin Jacobs, IMA Financial Group

A CIAB member will share insights as a chief marketing officer to highlight the priorities and challenges faced by marketing and communications teams within brokerage firms to provide COOs with a clearer understanding of how to leverage marketing technology to drive growth.

10:00 – 10:15 am **Break**

10:15 – 11:30 am **Real-Time Problem Solving & Knowledge Share**

This roundtable discussion will provide attendees with the opportunity to bring forward pressing challenges, seek immediate feedback from their peers, and discuss emerging trends that may impact brokerage operations. Participants should be ready to discuss top-of-mind issues.

11:30 am – Noon **Wrap Up & Next Steps**