

SYMPOSIUM **AGENDA**

MONDAY, SEPTEMBER 29

- 5:00 - 9:00 PM **Welcome Reception & Painting Reveal**
Experience the Boise State Blue Field at an exclusive networking dinner to unveil a commissioned painting by artist Robert Copple and documentary about Weathering the Storm.

TUESDAY, SEPTEMBER 30

- Hotel Renegade Overland Ballroom **SRA Symposium** *Moderated by Bre Cohen, Marketing Director*
Learn about SRA, the 831(b) Tax Code, and more.
- 7:30 - 9:00 AM **CPE (Optional)** *Presented by Peter Dawson, Tax Attorney & 831(b) Institute Advisor*
Earn 1.5 CPE Credits through NASBA - Tax Deferred Risk Mitigation For Business
- 9:00 - 9:30 AM **Breakfast**
- 9:30 - 9:40 AM **Welcome & Opening Remarks**
- 9:40 - 10:00 AM **State of SRA** *Presented by Van Carlson, Founder & CEO*
The latest updates at SRA and more.
- 10:00 - 10:30 AM **Expanding the Toolbox: 2025 Policies and Underwriting** *Presented by Dustin Carlson, President*
Discover how SRA is expanding the risk management toolbox with new 2025 policies built for the next wave of business challenges: covering everything from workforce shocks to contract defaults.
- 10:30 - 10:45 AM **Break:** *Please make your way to Breakouts on the 2nd Floor*
- 10:45 - 12:15 PM **Breakouts**
Breakouts are 40 minutes each. Choose Two.
- Sawtooth **Sales Tactics & Techniques** *Presented by SRA Sales Team*
Best practices for presenting 831(b) to your clients and how to maximize marketing materials, events, and other opportunities.
- Bonneville **Claims and Risk Co-Ops** *Presented by Sam Solberg, Operations Director*
Gain a clear understanding of the claims process, including how claims are paid and the role of risk co-ops. Real-world examples of filed claims will illustrate how these plans function in practice.
- Hughes **Artificial Intelligence, Real Business Results** *Presented by Joe Davis, Technology Director*
Today's accessible AI can streamline work, boost decision-making, and safely power your first steps into everyday use.
- 12:15 - 1:00 PM **Lunch with The 831(b) Institute** *Presented by Peter Dawson, Tax Attorney & 831(b) Institute Advisor*
- 1:00 - 2:30 PM **Breakouts**
Located on the 2nd Floor. Breakouts are 40 minutes each. Choose Two.
- Sawtooth **Captive Solutions for Commercial Insurance** *Presented by Stephanie Forbes, President, InsurEdge Group and Nate Resnicek, President & Principal Consultant, Captives.Insure*
Discover how captive insurance can replace costly traditional policies with a smarter approach that delivers cost savings, control, and long-term stability.
- Hughes **Business Resiliency in an Uncertain World** *Presented by Joe Anderson, President, Fortify Risk Management*
Achieving agility and resilience: pre-planning for disaster - setting your clients up to advance when others retreat.
- Mckenzie **Tell Your Story, Protect Your Business** *Presented by Colin Gorton & Demaree Donaghu, LS2 Group*
A down-to-earth look at how advisors like you can take advantage of simple PR tips and tricks to share their story and cut through the noise.
- 2:30 - 2:45 PM **Break:** *Please make your way back to The Overland Ballroom on the 8th Floor*
- 2:45 - 2:50 PM **Sales Incentive** *Presented by Dee Hazen, Sales Director*
A unique opportunity to earn a Weather the Storm painting as a powerful motivator for success.

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TUESDAY, SEPTEMBER 30

- 2:50 - 3:20 PM **831(b) Plan Taxes**, Presented by Brian Van Camp, Managing Partner & Director of Tax Strategy, Linked Accounting
Tax filings for your client's 831(b) Plans and Tax Process
- 3:20 - 4:00 PM **Legal Overview** Presented by Brandon Keim, Certified Tax Law Specialist & Senior Partner, Frazer Ryan Goldberg & Arnold LLP
A review of recent 831(b) court cases, the latest IRS regulations, and other updates.
- 4:00 - 4:15 PM **Final Remarks**, Presented by Van Carlson, Founder & CEO
- 6:00 - 9:00 PM **Appreciation Dinner**
The Brickyard
601 W Main St
Please meet in the Renegade Lobby at 5:30 to walk the 5 blocks to dinner

WEDNESDAY, OCTOBER 1

- 9:00 - 9:30 AM **Breakfast & Opening Remarks**
- 9:30 - 10:50 AM **Panel Discussion** Brandon Keim, Van Carlson, Maggi Lazarus, and Peter Dawson
Moderated by Dustin Carlson
- 11:00 - 12:30 AM **Becoming Anti-Fragile in Uncertain Times** Keynote Speaker Dr. Roger Hall, Business Psychologist
Discover how to transform worry into productive planning, understand the links between fear, control, and information gathering, and recognize how media amplifies fear. Learn why fear distorts risk, hinders problem-solving, and how to build resilience by becoming truly anti-fragile.
- 12:30 - 2:00 PM **Networking Lunch** Special Guest David Meltzer, Entrepreneur, Author & Philanthropist
Master Your Mindset with 5 Daily Practices
Baraboo Supper Club @ Hotel Renegade Lobby

RENEGADE **FLOOR PLAN**

