

Insurance Industry Conference

ISCPA
IOWA SOCIETY OF CPAs

Agenda

8:15-8:25 a.m. | Welcome remarks

Lindsey Haley | Iowa Society of CPAs
Heidi DeMarais | EY | Committee Chair

Bishop AB | Channel 1

8:25-9:15 a.m. | Economic and Investments Update

Billy Backer (moderator) | American Equity Investment Life Holding Company

Binay Chandgothia | Principal Financial Group

Michael Wolf | Deloitte

Bishop AB | Channel 1

9:15-9:30 a.m. | Break

9:30-10:20 a.m. | Emerging Technologies in Insurance

Kumar Sundaram | PwC

Bishop AB | Channel 1

10:20-10:35 a.m. | Break

10:35-11:25 a.m. | Breakout sessions

NAIC Update

Connie Jasper Woodroof | CJW Associates

Bishop AB | Channel 1

Tax Update

Brian Patz | Deloitte

Jeff Webb | Deloitte

Tom Wheeland | FORVIS

Salon 2/3 | Channel 2

11:25-11:40 a.m. | Break

In-person attendees attending bonus session: Pick up lunch in pre-function area and return to Bishop AB.

In-person attendees not attending bonus session: Pick up lunch and be seated at tables in pre-function area.

Webcast attendees: Lunch break from **11:25 a.m.-12:40 p.m.**

11:40 a.m.-12:30 p.m. | Optional bonus lunch session:

Building Your Ethical Leadership Using the 4 I's

Jeremy Wortman, Ph.D. | HRD Initiatives

Bishop AB

Qualifies for one extra hour of CPE credit (8 hours). Additional sign-in required. Available to in-person attendees only.

12:30-12:40 p.m. | Break

12:40-1:30 p.m. | Building Your Ethical Leadership Through Emotional Intelligence

Jeremy Wortman, Ph.D. | HRD Initiatives

Bishop AB | Channel 1

1:30-1:45 p.m. | Break

1:45-2:35 p.m. | Breakout sessions

GAAP Accounting Update

Anne Potas | EY

Bishop AB | Channel 1

NAIC Update

Connie Jasper Woodroof | CJW Associates

Salon 2/3 | Channel 2

Note: This session is a repeat of the 10:35 a.m. session.

2:35-2:50 p.m. | Break

2:50-3:40 p.m. | Hot Topics Speed Round

David Brown | Wellmark

Ken McCullum | Principal Financial Group

Don Seibel | Farm Bureau Financial Services

Sean Vicente (moderator) | KPMG

Dave Wingert | Grinnell Mutual Reinsurance Company

Bishop AB | Channel 1

3:40-3:55 p.m. | Break

3:55-4:45 p.m. | Building Operational Strategy by Putting People First

Jeremy Wortman, Ph.D. | HRD Initiatives

Bishop AB | Channel 1

Thank you to our state CPA society partners:

 mncpa

 Nebraska Society of Certified Public Accountants