



DELEGATE COUNCIL MEETING

June 21-22, 2018

Agenda

Thursday, June 21, 2018

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|----------------|---|----------------------|
| 12 Noon | Registration Opens | |
| 1:00 PM | Benefit Account Management & Strategies - 1 Hour CE | |
| 2:00 PM | Delegate Council Call to Order Invocation, Pledge of Allegiance | <i>Terry Gaither</i> |
| | Report of Credentials Committee | <i>Sandy Solomon</i> |
| 2:05 PM | Report of National Committeeperson NAIFA Update - The Future NAIFA 2018 NAIFA Performance + Purpose Promotion | <i>Jim Coviello</i> |
| 2:25 PM | Report of Treasurer | <i>Matt Stone</i> |
| 2:30 PM | Life in the North Carolina Legislature <i>Experiences and Stories of Representative Collins</i> | <i>Jeff Collins</i> |
| 3:15 PM | Flexibility & Usage of Whole Life Compared to Real Property | <i>John Wheeler</i> |
| 4:45 PM | Closing Remarks Housekeeping | <i>Terry Gaither</i> |
| 5:00 PM | Adjourn | <i>Terry Gaither</i> |
| 7:00 PM | President's Banquet & Awards Ceremony <i>Presentation of Awards</i> <i>Presentation of Advisor of Year</i> <i>Closing Remarks</i> | |

Friday, June 22, 2018

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|-----------------|---|--|
| 8:15 AM | ERISA HIPAA ACA Compliance - 1 Hour CE | |
| 9:05 AM | Call To Order | <i>Terry Gaither</i> |
| 9:10 AM | IFAPAC Update From National Presentation of Awards | <i>Roger Sims</i> <i>Roger Sims</i> |
| 9:20 AM | Report on NCIFA Foundation | <i>Jim Coviello</i> |
| 9:30 AM | NAIFA NC Lobbyist - 2018-2019 Legislative Activities <i>Katye Jobe, Associate Attorney - Smith Moore Law, Raleigh, NC</i> | <i>Katye Jobe</i> |
| 10:00 AM | DOI News & Update from Commissioner | <i>Mike Causey</i> |
| 10:30 AM | BREAK | |
| 10:45 AM | NAIFA National Trustee Remarks Town Hall With Members/Q & A | <i>Todd Grantham</i> |
| 11:30 AM | Closing Comments by NAIFA NC President Report of Nominating Committee Installation of Officers | <i>Terry Gaither</i> <i>Sandy Solomon</i> <i>Todd Grantham</i> |
| 12 Noon | Delegate Council Concludes | <i>Sandy Solomon</i> |
| | Foundation Annual Membership Meeting | <i>Jim Coviello</i> |
| 12:15 PM | Adjournment | <i>Jim Coviello</i> |