

October 15 - 17, 2023  
2023 Fall Principals Meeting  
InterContinental Hotel  
San Diego, CA



**Dress is business casual for meetings**

**Sunday, October 15, 2023**

**5:30 PM**

*Dinner Wine Sponsor*



**EARLY ARRIVAL DINNER**

Huntress Steakhouse

376 Fifth Avenue

San Diego, CA

Dinner reservation is 6:00 pm

Dress code: Upscale Casual

**\*\*Restaurant is a 25 minute walk from the hotel. For those who do not want to walk, please use ride-share.**

**Monday, October 16, 2023**

**7:30 AM - 8:30 AM**

**BREAKFAST** ( Pacific Foyer)

**8:30 AM**

**BUSINESS MEETING** (Pacific Ballroom D)

**8:30 AM - 8:35 AM**

***Opening and Intro***

***Troy Moody, Moody Insurance Agency***

*(members only)*

*RiskProNet has a policy of strict compliance with federal and state antitrust laws and is committed to legal and ethical behavior.*

*RiskProNet members should, at all times, follow the guidelines contained in its Antitrust Compliance Policy and to avoid or prevent situations which may pose possible violations of this policy.*

TROY - Cover housekeeping items

**8:35 AM - 9:40 AM**

***Applied Intelligence - What you need to know***

***Erik Vendermause, M3***

*AI / Bots - what you need to know and how M3 is/plans to utilize AI.*

**9:40 AM - 10:10 AM**

***IBI Cal***

***Jill Epstein, JD | CEO, Independent Insurance Agents & Brokers of California***

*AS California's trends tend to lead the way for all other states, Jill will review the current "state of the market" in California.*

**10:10 AM - 10:20 AM**

***Break***

- |                            |  |
|----------------------------|--|
| <b>10:20 AM - 10:25 AM</b> | <b><i>New Member Update</i></b><br><i>Dave Linhardt, Crane</i>   |
| <b>10:25 AM - 11:00 AM</b> | <b><i>RPN Business Session</i></b><br>Elect 2024 Board<br>Review Organization Goals<br>Member update   |
| <b>11:00 AM - 12:20 PM</b> | <b><i>Roundtable Discussion</i></b><br><br>* <b><i>Sales Training</i></b><br>* <b><i>Recruitment</i></b><br>* <b><i>Marketplace</i></b>  |
| <b>12:20 PM - 1:20 PM</b>  | <b><i>Lunch</i></b>  |
| <b>1:20 PM - 2:20 PM</b>   | <b><i>A London Perspective</i></b><br><b><i>David Price, CEO, Fenchurch Broking</i></b><br><i>Update on London business</i>  |
| <b>2:20 PM - 5:20 PM</b>   | <b><i>Agency Planning</i></b><br><b><i>Webb Millward, Reagan Consulting</i></b><br><i>Troy to introduce</i>  |
| <b>6:00 PM - 8:30 PM</b>   | <b><i>Dinner</i></b><br><i>Osteria Primavera</i><br><i>722 Fifth Avenue</i><br><i>San Diego, CA</i><br><br><i>Dinner reservation is 6:30 pm</i><br><br><i>**Restaurant is a 20 minute walk from the hotel. For those who do not want to walk, please use ride-share.</i> |



**Thanks to our  
wine sponsor!!!!**

**Tuesday, October 17, 2023**

- |                          |  |
|--------------------------|--|
| <b>7:30 AM - 8:30 AM</b> | <b><u>BREAKFAST</u></b>                                    |
| <b>8:30 AM</b>           | <b><u>BUSINESS MEETING</u></b>                             |
| <b>8:30 AM - 9:45 AM</b> | <b><i>Wholesale Update From CRC &amp; Benefit mail</i></b> |

**9:45 AM - 11:15 AM**

***Travelers Update***

***Shay Conyer, Travelers***

Travelers will update group on the current marketplace followed by a Q&A session.

**11:15 AM - 11:30 AM**

***Wrap Up / Open Discussions***

**11:30 AM**

**ADJOURN**

**Next Meeting**

April 28 - 30, 2024 | Date and location to be confirmed