

April 23 - 25, 2023  
2023 Spring Principals Meeting  
*The Adolphus Hotel*  
*Dallas, TX*



**Dress is business casual for meetings**

**Sunday, April 23, 2023**

**4:00 PM - 5:00 PM**

**Board Meeting** (*President's Room*)

~Board members only

**5:30 PM**

**EARLY ARRIVAL DINNER** (*Topgolf*)

Sponsored by:



8787 Park Lane  
Dallas, TX

Bus will depart hotel for a short ride to Topgolf for drinks, dinner and a tournament.

**Monday, April 24, 2023**

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

**BREAKFAST** (*Governor's Foyer - 19th Floor*)

**8:30 AM**

**BUSINESS MEETING** (*Governors Ballroom-19th Floor*)

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

***Opening and Intro***

(*members only*)

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

*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 Moody** and **Dave Linhardt** will introduce the 3 new principals from CMR

**8:35 AM - 9:30 AM**

(*members only*)

***Agency Updates, Success Stories***

Each agency will provide group with a brief update on any changes from prior meeting.

**9:30 AM - 10:00 AM**

***Reconstruction Experts***

**Troy Moody** to introduce **Madison Seymour**, National Broker Account Manager and **Pip Turnbull**, Executive Director of Business Development, Sales, Marketing with *Reconstruction Experts*.

Reconstruction Experts is subsidiary of Johns Lyng Group (JLG), an Australian based market leader in the supply of Specialty Building and Restoration Services. Reconstruction Experts offers 24/7 emergency response services for brokers. They are launching in Texas and Colorado; other states will follow.

This service provides emergency Makesafe, Restoration and reinstatement works across Texas & Colorado for brokers. Through this offering we can fast-track repair works following a range of insured events including severe weather disasters, fire, biohazards, impact, burglary, and malicious damage.

**10:00 AM - 10:20 AM**

**BREAK** (*Governor's Foyer*)

**10:20 AM - 12:20 PM**

***MarshBerry - State of the Industry and Trends in the Employee Benefits Brokerage Space***

**Tommy McDonald**, *Director*, MarshBerry

The insurance brokerage business continues to rapidly consolidate and change, but most of the core fundamentals that make industry great are still foundationally strong. 2023 will most likely bring another year of tremendous growth and new opportunities. During this 2 hour session, Tommy McDonald, will deliver an industry update in areas of M&A, growth, profitability and key trends relative to our experience in working with insurance firms from all over the country. The session will also dedicate time to best practices focused on what is happening in the Employee Benefits brokerage space. The Presentation will be broken up into sections so that the RiskProNet attendees can provide their individual firm perspective on the key trends and MarshBerry will facilitate a discussion with the group in Texas.

**12:20 PM - 1:20 PM**

**LUNCH** (*Governor's Foyer*)

**1:20 PM - 2:20 PM**

***CHUBB North America***

**Chris Maleno**, *Division President North America Field Operations*  
Chubb North America

Rob Larocca (SterlingRisk) will introduce Chris Maleno.

Chris will discuss NA P&C (including Financial Lines, and High Net Worth Personal Lines) Market/Industry Overview from CHUBB's Perspective.

**2:20 PM - 3:00 PM**

***How Do You Handle Your Bonus Programs***

*Open discussion on bonus plans within your agency*

*\* What are you currently doing for producers and non-producers*

*\* What have you tried that worked and did not work*

**3:00 PM - 3:15 PM**

**BREAK** (Governor's Foyer )

**3:15 PM - 4:15 PM**

***ReSource Pro***

*Donna Rose, Senior Sales Executive*

*Brenda Grow, ARM, CIC, MA, Senior Solutions Specialist*

*ReSource Pro*

Join ReSource Pro for an overview of our services and latest offerings. Learn how we maintain our 98% accuracy with our training and how we've integrated automation capabilities into the work we do. We'll share tips for getting the most out of your partnership with us so you can accelerate business growth and enhance your client and employee experience.

**4:15 PM - 5:00 PM**

Recap of the day / Open Discussion

Members Only

**5:00 PM**

**ADJOURN**

**6:00 PM**



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

**RECEPTION / DINNER**

*Javier's Gourmet Mexican Restaurant*

*4912 Cole Avenue*

*Dallas, TX*

Bus departs hotel for restaurant promptly at 6:00 pm

**Tuesday, April 24, 2023**

**7:30 AM - 8:30 AM**      **BREAKFAST** (*Governor's Foyer*)

**8:30 AM**      **BUSINESS MEETING** (*Governor's Ballroom*)

**8:30 AM - 9:30 AM**      ***Wholesale Update From CRC***

**Brent Tredway**, President *CRC Brokerage*

**Justin & Ryan Purdy** - *The Purdy Property Team*

**Casey Allen**, Director Business Development, *Benefit Mall*

CRC GROUP will provide a state of the market overview and what retailers need to do to prepare their clients.

**9:30 AM - 10:30 AM**      ***Captives - Marketplace Discussion***

*An open discussion on P&C Captives led by Brad Reitzner (M3).*

*Artex*

*Captive Resources*

*Intuitive*

*Innovated Captive Solutions (ICS)*

*831B / Micro Captives*

**10:30 AM - 10:45 AM**      **BREAK** (*Governor's Foyer* )

**10:45 AM - 11:00 AM**      ***Practice Group Overview and New Website Review***

**Patti Reed**, RiskProNet

- Practice Groups; participation and engagement
- Demonstration of the new website and what is on the roadmap for improvements
- Discuss elections for Fall
- Review P&L

**11:00 AM - 12:00 PM**      ***Wrap Up / Open Discussions***

**12:00 PM**      **ADJOURN**

**Next Meeting**

October 15 - 17, 2023 | Date and location to be confirmed