CRAMER ROUNDTABLE SERIES

Insurance

November 13, 2025 | The Cosmopolitan *of* Las Vegas

CRAMER & associates

JackCramer.com

AGENDA*

8:00am	**Opening Remarks & Introductions**	**Todd Nixon**
8:15am	**Growth Strategies** - Building It from the Beginning - Aligning with GA Partners Who Add Value - Life Insurance as a Future Asset	**Matt Mendez –** D.A. Davidson **Chris Seebeck -** Truist
9:45am	**Working with Advisors** - Training Bankers and Advisors - Driving Sales Through Client Events - Working with HNW Clients	**Jessica Male** **Terry Bosworth –** Fifth Third **Clark Smith –** Truist
11:00am	**Partnering for Growth** - Creating Client Awareness - Smoothing Out the Insurance Process - The Evolution of Underwriting	**Mike Pompei –** Ash Brokerage **Dan Bonano –** Franklin Madison **Pearse McCormack –** Western & Southern
11:45am	**Lunch**	
12:50pm	**Technology and AI** - Practical Use Cases - Creating Efficiencies for Scalable Growth - Move Quickly, Pivot Faster	**Chris Slonecker –** First Horizon **Terry Evavold –** Cetera
1:30pm	**Data Presentation**	
2:05pm	**Financial Planning** - Planning as a Culture - Broaching the “Healthiness Conversation” - Long-Term Care	**Brian Corbett –** BMO **Holley Cary –** First Horizon Advisors
3:20pm	**Ask Anyone Anything**	**Open Forum**
4:00pm	**Closing Remarks**	**Rhonda Kulhanek**

***Times may shift based on group engagement.**