Board of Directors
Meeting Packet
March 14, 2019

New Hampshire Association of Insurance Agents

Board of Directors Meeting

Thursday, March 14, 2019

Agenda

I. Call to order — April Weismann, Chairwoman of the Board

II. Approve minutes from the previous meeting

III. Chairman's Report — April Weismann

A. Overview of Schedule of Events
B. Professional Development Days – May 7, 9, 14 and 16.
C. Golf Outing
D. Convention
E. Young Agents

IV. President's Report — Christopher Nicolopoulos

A. 2018-2019 Financials to date
B. Review of Membership/Partners/Affiliates
C. Legislative Committee
D. Education Committee
E. Building Update
F. Product update — Joan Pageau

V. National Director's Report — William Infantine

A. PAC update
B. National Legislative Meeting – May 9, 2019

VI. Adjournment – next meeting is Thursday, June 13, 2019 at 9:00, at 6 Garvins Falls Road, Concord

Minutes

NHAIA Board of Directors
Minutes – Thursday, December 6, 2018

Members In Attendance: Laura Akerley; Keith Beaujolais; Bret Cote; Greg Eastman; Will Infantine; Chris McIntosh; Beth Needham; Leo Paquin; Brian Parsons; Jamie Santo; Ryan Simpson; April Weismann; Randy Wentworth; Chris Nicolopoulos; Joan Pageau **Members Absent and Excused:** Jim Cassell; Kendra Cote;

I. The meeting was called to order by Chairwoman April Weismann at 9:05 am who asked that each member introduce themselves and she welcomed Beth Needham to the Board.

II. A motion to approve the 10/03/2018 minutes was made, seconded and passed as presented.

III. Tom Pare and Cheryl Little of Hession & Pare NHAIA's CPA firm gave their annual report on the recently completed audit. There were no recommendations and the report was accepted as presented.

IV. Chairwoman Weismann spoke on the following:

A. Outstanding Membership Dues – the number is smaller compared to past years and staff would be contacting each agency with President Nicolopoulos reporting at the March meeting.

B. Schedule of Events – provided to each Board member with encouragement to attend the Legislative Conference in May. Joan was directed to send a calendar invitation for each meeting to all Board members so the meetings can be on everyone's calendar for the year.

C. Legislative Committee was developed to review the upcoming bills. This committee consists of: Keith Beausoleil, Will Infantine, Chris McIntosh, Leo Paquin, Brian Parsons, Chuck Robinson and staffed by Chris N.

D. Education Committee – the Professional Development Days are being set up with the locations in Concord, Attitash, Manchester and Hampton Beach. Sponsorships have started coming in and more are expected.

V. President Chris Nicolopoulos, presented his report as follows:

A. Financials: Chris reviewed the Annual Convention financial report and then reviewed both NHAIA's and IAS's financials including comparisons to last year.

B. Legislative Update: a lengthy discussion on proposed bills ended with a Legislative Committee meeting being scheduled to thoroughly review each bill making any necessary plans to support or oppose.

VI. State National Director Will Infantine reported as follows:

A. PAC Update – SND Infantine gave a brief overview of PACs and how they help the industry and each agency. It was requested that BOD members make a voluntary contribution and that forms were provided for that purpose. He noted that NHAIA met our 2018 goal.

B. SND Infantine also encouraged members to attend the Legislative Conference held in Washington DC this Spring. It's an important opportunity to meet with NH representatives to discuss topics important to the insurance industry.

VII. The next Board of Directors' meeting will be held at 9:00 am, Thursday, March 14, 2018 at the NHAIA Headquarters, 6 Garvins Falls Road, Concord. The meeting adjourned at 11:05 am.

Respectfully Submitted,
Joan M. Pageau, AAI
Vice President

Chairwoman's Report

Overview of Events

2019 Events- Tentative Dates

Event	Tentative Date
Board of Directors Meeting	3/14/19
Professional Development Day (Concord)	5/7/19
Professional Development Day (North Conway)	5/9/19
Professional Development Day (Manchester)	5/14/19
Professional Development Day (Hampton)	5/16/19
Golf (Stonebridge - Goffstown)	6/6/19
Board of Directors Meeting	6/13/19
Annual Meeting (Portsmouth)	9/30-10/2/19
Board of Directors Meeting	10/2/19
Board of Directors Meeting	12/5/19

Golf Outing

Trusted Choice
INDEPENDENT INSURANCE AGENTS

NHAIA
New Hampshire Association of Insurance Agents

Trusted Choice 30th Annual Big 'I' Golf Classic

Thursday, June 6, 2019 @ Stonebridge Country Club, Goffstown, NH

REGISTRATION FORM

NHAIA's annual golf classic is open to all members, Partners in Progress, affiliate members and industry friends. Registration is limited to 144 golfers and registrations must be received **no later than May 31st**. There will be fun, prizes, and of course, bragging rights among your golfing peers.

The Classic will begin with a **shotgun start at 9:00 am**, in a **scramble format**. Registration fee is **$150.00** per golfer and includes morning coffee and home-made Cider Donuts, greens fee, golf cart, cocktails and lunch. There will be beverage carts on the course.
All cash and door prizes will be awarded at the luncheon immediately following golf.
Proper attire is required (collared shirts, no jeans). Soft Spikes Only.

Also, back by popular demand:
Young Agents Wine Raffle
Don't forget to bring a bottle valued at $10 or more!

Young AGENTS

Name			
Agency/Co.			
Street Address			
City/State/Zip			
Phone		**Email**	

Registration Fee Includes: Tournament, Greens Fee, Golf Cart, Morning Coffee & Donuts, Cocktails, Lunch, Cash Prize(s), Door Prize(s), Entry into the Putt for Dough Contest

Player's Name	✓	Registration @ $150. each	✓	Mulligan @ $5 each	✓	Wine Raffle @ 3 tickets for $10	Total Per Player
						Grand Total	

	Check	Payable to: N.H.A.I.A. , 6 Garvins Falls Road, Concord, NH 03301		
	Invoice Agency	NHAIA members only		
	Credit Card	VISA - MasterCard - Discover		
	Card Number			
	Exp Date		**Security Code:**	**Billing Zip Code:**
	Signature			

Questions? Contact Any NHAIA Staff Member

Trusted Choice®
INDEPENDENT INSURANCE AGENTS

NHAIA
New Hampshire Association of Insurance Agents

Trusted Choice 31st Annual Big "I" Golf Classic
June 6, 2019
Stonebridge Country Club

Sponsorship Opportunity	Sponsor Level	2019 Sponsors
Luncheon (Co-sponsorships available)	$2,000	
		MMG Insurance
Breakfast - Coffee and Pastries	$500	Quaker Special Risk
Driving Range	$750	
Lunch Hospitality	$1,000	Safeco Insurance
Registration Gift (sleeve of balls)	$1,000	Providence Mutual
Beverage Cart - Front Nine	$750	Hospitality Insurance Group
Beverage Cart - Back Nine	$750	
Snack Bags	$500	Peniel Environmental
Golf Carts (Co-sponsorships available)	$1,000	
Score Cards	$500	Safety Ins. Co.
Putt For Dough	$500	Acadia Insurance
Hole In One	$1,500	
1st Place	$600	
2nd Place	$500	
3rd Place	$400	
Program	$300	Vermont Mutual
Longest Drive (4 @ $50) Closest to Pin (4 @ $50) Strightest Drive (2 @ $50)	$500	Merchants Ins. Group
Pink Ball Challenge	$500	
Pro @ The Hole	$500	Capital Premium Financing
General Sponsorship - Multiple Opportunities	$500	Hanover Insurance Group

Convention

Trusted Choice
INDEPENDENT INSURANCE AGENTS

NHAIA
New Hampshire Association of Insurance Agents

120th Annual Convention

September 30 - October 2, 2019
Portsmouth Event Center, Portsmouth, NH

Registration Form - Please complete one form for each person attending

Name	Badge Name	Email
Spouse/Guest Name	Badge Name	Email
Agency/Company		
Address, City, State, Zip		
Telephone		

Event Description	Early Bird Offer Thru 8/16/19	After 8/16/19
Golf ONLY: Includes lunch, greens fees, cart and prizes. **Fee is not included with convention registration.**	☐ $150	☐ $150
Full Registration: Includes everything! If it's part of the convention - **EXCEPT GOLF** - it's included!	☐ $245	☐ $295
Monday Casino Night ONLY	☐ $50	☐ $50
Tuesday ONLY: Trade Show, Program, CEHs, Breakfast, Luncheon, Chairman's Reception & Installation Banquet.	☐ $195	☐ $245
Chairman's Reception & Installation Banquet ONLY: **(Included with Full or Tuesday registrations)**	☐ $95	☐ $95
Wednesday ONLY : Includes the Program, CEHs and Breakfast	☐ $45	☐ $75
Total Due to NHAIA	$	

Payment Information	**Check**	**Payable to: N.H.A.I.A. Send to: 6 Garvins Falls Road, Concord, NH 03301**
	Credit Card	☐ VISA ☐ MasterCard ☐ Discover
	Card Number	
	Expiration Date:	**Security Code:** **Billing Zip Code:**

For NHAIA Member Agencies Only

For each full registration bring another member of your staff to Tuesday's Programs, Lunch and Trade Show.

Name		Badge Name		Email	
Name		Badge Name		Email	
Name		Badge Name		Email	

Hotel Rooms $229. (plus tax)

To make your room reservation, please use these links (available soon!) or phone numbers and reference **"NHAIA Fall Conference"** :

Hampton Inn & Suites (603-430-3033) | Residence Inn Downtown (603-422-9200)

The deadline to reserve your room is **September 9th!**

Don't hesitate! The rooms will go fast!

Questions? Call us at 603-224-3965

Young Agents Committee

Year To Date Recap

January 15, 2019 - NH Food Bank - 12 young agents volunteered from 8:30 am to 11:30 am

March 3-5, 2019 - NH Winter Special Olympics - 4 young agents volunteered over the 3 days

Upcoming Events

April, 2019 - Food Drive / End68HoursofHunger - Raymond area

June 6, 2019 - Annual Wine Raffle at Annual Trusted Choice Big "I" Golf Classic

President's Report

NHAIA Financials

NHAIA
Profit & Loss Budget vs. Actual
September 2018 through August 2019

	Sep '18 - Aug 19	Budget	$ Over Budget	% of Budget
Income				
4204 · FFIC/Westport Ins. Royalty	20,714.87	39,000.00	-18,285.13	53.1%
4001 · Membership Dues	144,312.72	150,000.00	-5,687.28	96.2%
4002 · Professional Development Days	13,060.00	22,000.00	-8,940.00	59.4%
4003 · Affiliate Dues	4,500.00	5,000.00	-500.00	90.0%
4006 · Trusted Choice	1,250.00	20,000.00	-18,750.00	6.3%
4007 · Partners In Progress Dues	101,000.00	105,000.00	-4,000.00	96.2%
4012 · IAS Management Fee	84,000.00	168,000.00	-84,000.00	50.0%
4015 · Golf Tournament	4,760.00	25,000.00	-20,240.00	19.0%
4100 · Investment Income	799.83	1,000.00	-200.17	80.0%
4200 · Education Programs	92,665.17	150,000.00	-57,334.83	61.8%
4201 · Education Books/Self Study	20,049.90	35,000.00	-14,950.10	57.3%
4202 · Annual Meeting	122,265.00	80,000.00	42,265.00	152.8%
Total Income	609,454.20	800,000.00	-190,545.80	76.2%
Expense				
5219 · Equipment Lease/Maint./Service	10,294.58	17,000.00	-6,705.42	60.6%
5000 · IIABA Dues	55,931.04	56,000.00	-68.96	99.9%
5001 · Prof. Development Days Expenses	1,480.00	12,000.00	-10,520.00	12.3%
5050 · Association Salaries	175,099.88	372,000.00	-196,900.12	47.1%
5060 · Taxes	571.32	4,000.00	-3,428.68	14.3%
5100 · Association Benefits	36,006.40	73,000.00	-36,993.60	49.3%
5201 · Office Supplies/Postage	3,486.76	7,000.00	-3,513.24	49.8%
5203 · Golf Tournament	0.00	15,000.00	-15,000.00	0.0%
5204 · Dues/Maintenance/Misc.	2,819.00	6,000.00	-3,181.00	47.0%
5205 · Telephone	3,335.16	5,000.00	-1,664.84	66.7%
5206 · Rent	36,000.00	36,000.00	0.00	100.0%
5212 · Trusted Choice Ads	26,850.00	20,000.00	6,850.00	134.3%
5213 · Professional Accounting Fees	7,200.00	8,000.00	-800.00	90.0%
5226 · Insurance	9,014.00	9,000.00	14.00	100.2%
5300 · Officers Travel/Expenses	11,648.03	25,000.00	-13,351.97	46.6%
5700 · Education Book	8,424.81	15,000.00	-6,575.19	56.2%
5800 · Education Program	24,247.60	45,000.00	-20,752.40	53.9%
5850 · Annual Meeting	73,863.73	50,000.00	23,863.73	147.7%
6500 · Payroll Expenses	13,326.70	25,000.00	-11,673.30	53.3%
Total Expense	504,327.34	800,000.00	-295,672.66	63.0%
Net Income	**105,126.86**	**0.00**	**105,126.86**	**100.0%**

NHAIA
Profit & Loss Prev Year Comparison
September 2018 through February 2019

	Sep '18 - Feb 19	Sep '17 - Feb 18	$ Change	% Change
Income				
4204 · FFIC/Westport Ins. Royalty	20,714.87	28,816.14	-8,101.27	-28.1%
4001 · Membership Dues	144,312.72	138,461.85	5,850.87	4.2%
4002 · Professional Development Days	13,060.00	3,680.00	9,380.00	254.9%
4003 · Affiliate Dues	4,500.00	7,000.00	-2,500.00	-35.7%
4006 · Trusted Choice	1,250.00	77,692.54	-76,442.54	-98.4%
4007 · Partners In Progress Dues	101,000.00	96,500.00	4,500.00	4.7%
4012 · IAS Management Fee	84,000.00	84,000.00	0.00	0.0%
4014 · Miscellaneous Income	76.71	0.00	76.71	100.0%
4015 · Golf Tournament	4,760.00	3,950.00	810.00	20.5%
4100 · Investment Income	799.83	106.85	692.98	648.6%
4200 · Education Programs	92,665.17	105,126.39	-12,461.22	-11.9%
4201 · Education Books/Self Study	20,049.90	15,639.90	4,410.00	28.2%
4202 · Annual Meeting	122,265.00	122,530.00	-265.00	-0.2%
Total Income	609,454.20	683,503.67	-74,049.47	-10.8%
Expense				
5219 · Equipment Lease/Maint./Service	10,294.58	10,883.14	-588.56	-5.4%
66900 · Reconciliation Discrepancies	0.00	0.00	0.00	0.0%
5227 · Young Agents Expense	169.70	0.00	169.70	100.0%
5000 · IIABA Dues	55,931.04	57,678.96	-1,747.92	-3.0%
5001 · Prof. Development Days Expenses	1,480.00	1,000.00	480.00	48.0%
5050 · Association Salaries	175,099.88	161,838.25	13,261.63	8.2%
5060 · Taxes	571.32	3,202.31	-2,630.99	-82.2%
5100 · Association Benefits	36,006.40	34,841.50	1,164.90	3.3%
5201 · Office Supplies/Postage	3,486.76	2,111.54	1,375.22	65.1%
5203 · Golf Tournament	0.00	500.00	-500.00	-100.0%
5204 · Dues/Maintenance/Misc.	2,819.00	2,475.00	344.00	13.9%
5205 · Telephone	3,335.16	2,999.09	336.07	11.2%
5206 · Rent	36,000.00	36,000.00	0.00	0.0%
5211 · Committees	1,022.63	409.58	613.05	149.7%
5212 · Trusted Choice Ads	26,850.00	54,100.00	-27,250.00	-50.4%
5213 · Professional Accounting Fees	7,200.00	7,000.00	200.00	2.9%
5226 · Insurance	9,014.00	9,107.00	-93.00	-1.0%
5299 · Misc. Expense	760.00	0.00	760.00	100.0%
5300 · Officers Travel/Expenses	11,648.03	16,416.18	-4,768.15	-29.1%
5700 · Education Book	8,424.81	5,714.72	2,710.09	47.4%
5800 · Education Program	24,247.60	26,246.39	-1,998.79	-7.6%
5850 · Annual Meeting	73,863.73	65,370.67	8,493.06	13.0%
6500 · Payroll Expenses	13,326.70	12,366.90	959.80	7.8%
8000 · NH BET	2,776.00	0.00	2,776.00	100.0%
Total Expense	504,327.34	510,261.23	-5,933.89	-1.2%
Net Income	**105,126.86**	**173,242.44**	**-68,115.58**	**-39.3%**

NHAIA
Balance Sheet Prev Year Comparison
As of February 28, 2019

	Feb 28, 19	Feb 28, 18	$ Change	% Change
ASSETS				
Current Assets				
Checking/Savings				
1005 · Citizens Checking	1,000.00	1,000.00	0.00	0.0%
1006 · Citizens MMF	151,471.81	99,004.66	52,467.15	53.0%
1008 · Checking InsurBanc	92,172.07	175,689.81	-83,517.74	-47.5%
1009 · MMF InsurBanc	35,657.44	85,596.83	-49,939.39	-58.3%
Total Checking/Savings	280,301.32	361,291.30	-80,989.98	-22.4%
Accounts Receivable				
1100 · Accounts Receivable	3,899.00	9,151.00	-5,252.00	-57.4%
Total Accounts Receivable	3,899.00	9,151.00	-5,252.00	-57.4%
Other Current Assets				
1355 · Prepaid Inventory	7,960.35	8,452.10	-491.75	-5.8%
1353 · Prepaid Convention Expenses	3,800.00	4,700.00	-900.00	-19.2%
1354 · Other Prepaid	689.00	0.00	689.00	100.0%
Total Other Current Assets	12,449.35	13,152.10	-702.75	-5.3%
Total Current Assets	296,649.67	383,594.40	-86,944.73	-22.7%
Other Assets				
1030 · Big I Reinsurance Investment	20,000.00	20,000.00	0.00	0.0%
1051 · Investment in IAS	391,822.39	371,237.39	20,585.00	5.5%
1401 · Due From IAS, Inc.	100,000.00	0.00	100,000.00	100.0%
1402 · Due From Related Party	1,165.64	392.05	773.59	197.3%
Total Other Assets	512,988.03	391,629.44	121,358.59	31.0%
TOTAL ASSETS	**809,637.70**	**775,223.84**	**34,413.86**	**4.4%**
LIABILITIES & EQUITY				
Liabilities				
Current Liabilities				
Other Current Liabilities				
2002 · Advance Convention Receipts	13,400.00	10,800.00	2,600.00	24.1%
2003 · Advance Education Revenue	550.00	725.00	-175.00	-24.1%
Total Other Current Liabilities	13,950.00	11,525.00	2,425.00	21.0%
Total Current Liabilities	13,950.00	11,525.00	2,425.00	21.0%
Total Liabilities	13,950.00	11,525.00	2,425.00	21.0%
Equity				
3999 · P&L Summary	-18,745.44	-18,745.44	0.00	0.0%
3100 · Earnings of Subsidiary	85,030.64	64,445.64	20,585.00	31.9%
3040 · Retained Earnings	624,275.64	544,756.20	79,519.44	14.6%
Net Income	105,126.86	173,242.44	-68,115.58	-39.3%
Total Equity	795,687.70	763,698.84	31,988.86	4.2%
TOTAL LIABILITIES & EQUITY	**809,637.70**	**775,223.84**	**34,413.86**	**4.4%**

IAS Financials

Insurance Agents' Services, Inc.
Profit & Loss Budget vs. Actual
September 2018 through August 2019

	Sep '18 - Aug 19	Budget	$ Over Budget	% of Budget
Income				
4013 · Hosp. Insurance Member Rev.	16,431.02	42,000.00	-25,568.98	39.1%
4014 · Errors & Omissions - FFIC	1,347.30	18,000.00	-16,652.70	7.5%
4015 · Errors & Omissions-Swiss Re	552,399.40	770,000.00	-217,600.60	71.7%
4016 · E&O Insurance Refunds	-4,580.00			
4017 · Anthem Member Trust	10,363.61	20,000.00	-9,636.39	51.8%
4022 · Misc. Income	34.08			
4025 · Data Breach	17,252.50	25,000.00	-7,747.50	69.0%
4086 · Big I Markets Revenue Share	6,690.95	24,000.00	-17,309.05	27.9%
4150 · Rent Income Garvins Falls	70,384.26	98,000.00	-27,615.74	71.8%
4160 · Escrow Interest	1.48			
4170 · Capital Reserve Interest	9.59			
4210 · Product Incentive Income	2,403.51	3,000.00	-596.49	80.1%
Total Income	672,737.70	1,000,000.00	-327,262.30	67.3%
Expense				
5110 · FFIC/Westport Ins. Royalty	22,293.74	39,000.00	-16,706.26	57.2%
5111 · Errors & Omissions-Swiss Re	464,983.95	630,000.00	-165,016.05	73.8%
5113 · Hospitality Mut. Member Rev.	12,950.14	29,000.00	-16,049.86	44.7%
5114 · Anthem Memb. Trust	7,853.79	15,000.00	-7,146.21	52.4%
5120 · NHAIA Mgmt. Fee	84,000.00	168,000.00	-84,000.00	50.0%
5125 · Data Breach Cov.	15,577.50	19,000.00	-3,422.50	82.0%
5202 · Professional Accounting Fees	7,200.00	7,000.00	200.00	102.9%
5501 · Office Supplies	226.82			
5506 · Insurance Regulatory Fees	3,179.50	6,000.00	-2,820.50	53.0%
5507 · Depreciation	16,723.00	19,000.00	-2,277.00	88.0%
6000 · State/Federal Taxes	2,270.00			
6200 · Garvins Falls Expenses	37,567.92	68,000.00	-30,432.08	55.2%
Total Expense	674,826.36	1,000,000.00	-325,173.64	67.5%
Net Income	**-2,088.66**	**0.00**	**-2,088.66**	**100.0%**

Insurance Agents' Services, Inc.
Profit & Loss Prev Year Comparison
September 2018 through February 2019

	Sep '18 - Feb 19	Sep '17 - Feb 18	$ Change	% Change
Income				
4013 · Hosp. Insurance Member Rev.	16,431.02	26,936.76	-10,505.74	-39.0%
4014 · Errors & Omissions - FFIC	1,347.30	13,282.95	-11,935.65	-89.9%
4015 · Errors & Omissions-Swiss Re	552,399.40	574,571.23	-22,171.83	-3.9%
4016 · E&O Insurance Refunds	-4,580.00	-150.38	-4,429.62	-2,945.6%
4017 · Anthem Member Trust	10,363.61	12,212.76	-1,849.15	-15.1%
4022 · Misc. Income	34.08	42.77	-8.69	-20.3%
4025 · Data Breach	17,252.50	17,038.26	214.24	1.3%
4086 · Big I Markets Revenue Share	6,690.95	8,196.73	-1,505.78	-18.4%
4150 · Rent Income Garvins Falls	70,384.26	68,758.26	1,626.00	2.4%
4160 · Escrow Interest	1.48	1.89	-0.41	-21.7%
4170 · Capital Reserve Interest	9.59	11.40	-1.81	-15.9%
4210 · Product Incentive Income	2,403.51	924.54	1,478.97	160.0%
Total Income	672,737.70	721,827.17	-49,089.47	-6.8%
Expense				
5110 · FFIC/Westport Ins. Royalty	22,293.74	29,821.39	-7,527.65	-25.2%
5111 · Errors & Omissions-Swiss Re	464,983.95	481,526.86	-16,542.91	-3.4%
5113 · Hospitality Mut. Member Rev.	12,950.14	20,506.72	-7,556.58	-36.9%
5114 · Anthem Memb. Trust	7,853.79	8,943.50	-1,089.71	-12.2%
5120 · NHAIA Mgmt. Fee	84,000.00	84,000.00	0.00	0.0%
5125 · Data Breach Cov.	15,577.50	15,248.28	329.22	2.2%
5202 · Professional Accounting Fees	7,200.00	7,000.00	200.00	2.9%
5501 · Office Supplies	226.82	0.00	226.82	100.0%
5506 · Insurance Regulatory Fees	3,179.50	5,088.50	-1,909.00	-37.5%
5507 · Depreciation	16,723.00	19,700.00	-2,977.00	-15.1%
6000 · State/Federal Taxes	2,270.00	6,720.00	-4,450.00	-66.2%
6200 · Garvins Falls Expenses	37,567.92	37,250.62	317.30	0.9%
Total Expense	674,826.36	715,805.87	-40,979.51	-5.7%
Net Income	-2,088.66	6,021.30	-8,109.96	-134.7%

Insurance Agents' Services, Inc.
Balance Sheet Prev Year Comparison
As of February 28, 2019

	Feb 28, 19	Feb 28, 18	$ Change	% Change
ASSETS				
Current Assets				
Checking/Savings				
1026 · InsurBanc PT checking	3,363.53	3,100.46	263.07	8.5%
1027 · InsurBanc PT MMF	20,733.93	14,509.19	6,224.74	42.9%
1028 · InsurBanc OP Checking	4,745.34	5,710.01	-964.67	-16.9%
1029 · InsurBanc OP MMF	29,796.14	33,300.44	-3,504.30	-10.5%
1031 · Garvins Falls Operating	20,568.22	26,147.43	-5,579.21	-21.3%
1032 · Garvins Falls SD Escrow	2,709.76	3,524.50	-814.74	-23.1%
1033 · Garvins Falls Capital Reserve	23,034.58	23,013.43	21.15	0.1%
Total Checking/Savings	104,951.50	109,305.46	-4,353.96	-4.0%
Accounts Receivable				
1100 · Accounts Receivable	15,125.59	16,272.94	-1,147.35	-7.1%
Total Accounts Receivable	15,125.59	16,272.94	-1,147.35	-7.1%
Other Current Assets				
1353 · Prepaid Mgmt. Fee	-0.19	-0.19	0.00	0.0%
Total Other Current Assets	-0.19	-0.19	0.00	0.0%
Total Current Assets	120,076.90	125,578.21	-5,501.31	-4.4%
Fixed Assets				
1430 · Land	139,700.00	128,000.00	11,700.00	9.1%
1431 · Building	554,238.01	554,238.01	0.00	0.0%
1531 · Office Equipment	57,935.71	57,935.71	0.00	0.0%
1631 · Accm. Depr. - Off. Equip.	-100,743.88	-84,020.88	-16,723.00	-19.9%
Total Fixed Assets	651,129.84	656,152.84	-5,023.00	-0.8%
TOTAL ASSETS	**771,206.74**	**781,731.05**	**-10,524.31**	**-1.4%**
LIABILITIES & EQUITY				
Liabilities				
Current Liabilities				
Accounts Payable				
2000 · Accounts Payable	29,587.86	24,824.98	4,762.88	19.2%
Total Accounts Payable	29,587.86	24,824.98	4,762.88	19.2%
Other Current Liabilities				
2001 · Due to/from NHAIA	100,000.00	0.00	100,000.00	100.0%
2505 · Deferred Tax Liability	2,892.00	2,727.00	165.00	6.1%
2506 · Federa Income Taxes	-3,272.00	-14.00	-3,258.00	-23,271.4%
2511 · State Taxes- NH	81.00	51.00	30.00	58.8%
2550 · Garvins Falls Security Deposits	3,630.00	4,330.00	-700.00	-16.2%
Total Other Current Liabilities	103,331.00	7,094.00	96,237.00	1,356.6%
Total Current Liabilities	132,918.86	31,918.98	100,999.88	316.4%
Long Term Liabilities				
2600 · Mortgage Payable	248,553.89	372,552.75	-123,998.86	-33.3%
Total Long Term Liabilities	248,553.89	372,552.75	-123,998.86	-33.3%
Total Liabilities	381,472.75	404,471.73	-22,998.98	-5.7%
Equity				
3040 · Retained Earnings	391,722.65	371,138.02	20,584.63	5.6%
3221 · Capital Stock	100.00	100.00	0.00	0.0%
Net Income	-2,088.66	6,021.30	-8,109.96	-134.7%
Total Equity	389,733.99	377,259.32	12,474.67	3.3%
TOTAL LIABILITIES & EQUITY	**771,206.74**	**781,731.05**	**-10,524.31**	**-1.4%**

Membership

Annual Dues Report

2018-2019

NHAIA Membership

Active Members:	154	
Dues Income to date:	$144,312.72	(2018 Dues to date: $138,461.85)
New Members 2019:	2	
Dues Unpaid:	1 (New Hampshire Underwriters)	

Partners in Progress

2019 Partners:	38 (7 we are still waiting on)	
2019 Partners Dues Income:	$103,500	(2018 Dues to date: $96,500)

Affiliates:

2018 Affiliate Members:	10	
2018 Affiliate Dues Income:	$5,000	(2018 Dues to date $7,000)

Legislative Committee

2019 Legislative Session						
HOUSE BILLS						
LSR/ BILL #	PRIME SPONSOR	TITLE	ANALYSIS	COMMITTEE	STATUS	POSITION
HB 179	Rep Schmidt	Establishing a New Hampshire health access corporation.	This bill establishes a New Hampshire health access corporation and health access fund.	Commerce	Killed	Oppose
HB 180	Rep Schmidt	Establishing a commission to examine the feasibility of the New England states entering into a compact for a single payer health care program.	This bill establishes a commission to examine the feasibility of the New England states entering into a compact for a single payer health care program.	Commerce	Killed	Oppose
HB 211	Rep Schmidt	Relative to inquiries by prospective employers concerning salary history.	This bill prohibits an employer from requiring a prospective employee to disclose his or her salary history prior to an offer of employment.	Labor	House: Passed	Oppose
HB 227	Rep Komi	Relative to the length of time an employer may lease an employee through an employee leasing company.	This bill limits the length of time that a person may work for an employee leasing company.	Labor	Killed	Oppose
HB 233	Rep Butler	Relative to the group and individual health insurance market.	This bill establishes the provisions of the Patient Protection and Affordable Care Act of 2009, Public Law 111-148, as amended in statute.	Commerce		Oppose

HB 252	Rep Seaworth	Establishing a committee to study certain labor statutes.	This bill establishes a committee to study certain labor statutes and labor department rules.	Labor	Committee Report: Ought to Pass with Amendment #2019-0156h (Vote 12-6; RC)	Monitor
HB 253	Rep Cahill	Relative to criminal records checks in the employee application process.	This bill prohibits employers from asking a job applicant about his or her criminal history prior to an interview.	Labor	House: Passed	Oppose
HB 257	Rep Hunt	Relative to purchasing alliances.	This bill declares that health coverage purchased through a qualified purchasing alliance shall be considered by the department of insurance to be large group coverage. The bill also clarifies certain laws relative to purchasing alliances.	Commerce	Retained in Committee	Support
HB 272	Rep Schmidt	Relative to temporary workers.	This bill establishes notification and disclosure provisions for the hiring of temporary workers.	Labor	House: Passed	Monitor
HB 277	Rep Knirk	Establishing a commission to study a public option for health insurance.	This bill establishes a commission to study a public option program for health insurance in New Hampshire	Commerce		Monitor
HB 278	Rep Butler	Relative to the New Hampshire insurance department's annual hearing requirement.	This bill updates the insurance commissioner's annual public hearing requirement relative to premium rates.	Commerce	House: Passed	Support
HB 285	Rep McBeath	Relative to filing and approval of rates and rating plans applicable to workers' compensation.	This bill declares that when approved by the insurance commissioner, workers' compensation rates are open to public inspection.	Labor	House: Passed	Support

HB 292	Rep Butler	Relative to including brokers fees in the calculation of the insurance premium tax.	This bill includes brokers fees in the calculation of the insurance premium tax.	Commerce		Oppose
HB 293	Rep. Cushing	Relative to employee credit privacy.	This bill prohibits employers from using credit history in employment decisions.	Labor	Majority Committee Report: Ought to Pass (Vote 12-7; RC	Oppose
HB 337	Rep Bartlett	Relative to property and casualty insurance.	This bill makes certain changes in the laws relative to property and casualty insurance.	Commerce	House: Passed	Support
HB 338	Rep Bartlett	Relative to rebates under the law governing unfair insurance practices.	This bill moves the exceptions to rebating from RSA 402 to the law regulating unfair insurance practices for purposes of clarity.	Commerce	House: Passed	Support
HB 339	Rep Bartlett	Relative to commercial modernization.	This bill makes changes to the laws governing property and casualty insurance, specifically commercial modernization.	Commerce	House: Passed	Support
HB 341	Rep McBeath	Relative to insurance investigations.	This bill clarifies what the insurance commissioner may disclose to an insured or claimant who has made a complaint against an insurer during an investigation	Commerce	Killed	Monitor
HB 342	Rep McBeath	Relative to insurance examinations.	This bill clarifies the disclosure of reports and other information related to workers' compensation audits to the department of labor.	Commerce	House: Passed	Support
HB 346	Rep. Meuse	Relative to noncompete agreements.	This bill governs noncompete agreements between employers and employee	Labor	Retained in Committee	Oppose

HB 347	Rep Hunt	Adding insurer's policy administration expenses to commercial rate standards.	This bill adds insurer's policy administration expenses to commercial rate standards.	Commerce	House: Passed	Support
HB 432	Rep Williams	Relative to automobile insurance reimbursement rates.	This bill clarifies automobile insurance reimbursement rates for repair of damaged vehicles. This bill is a result of the committee to study reimbursement rates under automobile insurance polices, established by 2018, 13.	Commerce		Monitor
HB 433	Rep Hunt	Relative to foreign insurance companies.	This bill inserts a definition section for clarity and requires certain foreign insurance companies to file a report with the insurance commissioner relative to all surplus lines insurance transacted by the insurer for insurance risks in this state.	Commerce	House: Passed	Monitor
HB 532	Rep Cahill	Relative to payment for earned but unused vacation time.	This bill requires an employer to pay its employees for earned but unused vacation or personal time. The bill also requires employers to pay terminated employees for vacation time and personal time.	Labor	Retained in Committee	Oppose
HB 586	Rep. Torosian	Relative to lender-placed insurance on motor vehicles.	This bill establishes the creditor-placed insurance act.	Commerce		Monitor
HB 604	Rep Knick	Establishing a commission to assess benefits and costs of a "health care for all" program for New Hampshire.	This bill establishes a commission to study the benefits and cost of a "health care for all" program for New Hampshire.	Commerce	House: Passed	Monitor
HB 606	Rep Butler	Relative to certain insurance licensing statutes.	This bill updates certain insurance licensing statutes	Commerce	House: Passed	Support
HB 607	Rep Butler	Relative to life and health insurance.	This bill recodifies provisions of law regarding medically necessary dental services from medical underwriting to the RSA chapters governing health insurance. This bill also changes the date when continuing care communities must submit an annual report.	Commerce	House: Passed	Monitor
HB 613	Rep Leishman	Relative to mandatory automobile insurance.	This bill requires proof of motor vehicle liability insurance in order to register a motor vehicle.	Commerce	Retained in Committee	Oppose
HB 620	Rep Hunt	Relative to the penalty fee structure for late premium tax payments.	This bill establishes a graduated fee schedule for payment of the insurance premium tax.	Commerce	==TIME CHANGE== Public Hearing: 03/14/2019 09:30 am LOB 202	Support

HB 654	Rep Butler	Relative to surety required on construction loans.	This bill grants discretion to the housing finance authority to require bonds, bond equivalents, or any other surety to assure performance on contracts awarded.	Commerce		Oppose
HB 656	Rep Butler	Establishing a commission to study the impact of financial initiatives for commercially insured members by drug manufacturers on prescription drug prices and health insurance premiums.	This bill establishes a commission to study the impact of financial initiatives for commercially insured members by drug manufacturers on prescription drug prices and health insurance premiums.	Commerce		Monitor
HB 657	Rep Butler	Relative to the lowest cost option in the formulary under the managed care law.	This bill requires health plans offering prescription drug benefits under the managed care law to include on the formulary the drug with the lowest cost option for the insured.	Commerce		Monitor
HB 658	Rep Butler	Relative to price increases of drugs under the managed care law.	This bill clarifies the content of provider contract standards under the managed care law.	Commerce		Monitor
HB 659	Rep Butler	Relative to reporting of internal pharmaceutical costs.	This bill requires the insurance commissioner to request data from health carriers regarding prescription drug benefits which are outsourced to a pharmacy benefit manager or similar entity as part of the preparation for the department's annual hearing requirement.	Commerce		Monitor
HB 664	Rep Williams	Relative to vehicle repair standards.	This bill requires an insurer to reimburse an automobile repairer for all repairs if the repairer follows an original equipment manufacturer recommended collision repair procedures.	Commerce		Monitor
HB 670	Rep Butler	Relative to the cost of prescription drugs.	This bill requires health insurance carriers to maintain certain information relative to prescription drug costs within their data systems for purposes of the managed care law.	Commerce		Monitor
HB 681	Rep Flanagan	Requiring insurance companies writing commercial insurance to report unpaid premiums to a third party.	his bill requires insurance companies licensed to do business in this state to report unpaid premiums to a third party.	Commerce		Monitor

HB 685	Rep Luneau	Relative to ambulance billing, payment for reasonable value of services, and prohibition on balance billing.	This bill clarifies ambulance billing under the law governing emergency and medical trauma services.	Commerce		Oppose
HB 697	Rep Schmidt	Relative to Medicare for all.	This bill establishes a single payer health care system to provide health care for the citizens of New Hampshire.	Commerce	Killed	Oppose
HB 712	Rep Wallner	Relative to a family and medical leave insurance program.	This bill establishes a system of paid family and medical leave insurance.	Commerce	House Labor: Passed House Finance:	Oppose
HB 717	Rep. Schmidt	Prohibiting prescription drug manufacturers from offering coupons or discounts to cover insurance copayments or deductibles.	This bill prohibits with limited exceptions, prescription drug manufacturers from offering coupons or discounts to cover insurance copayments, or deductibles.	Commerce	Public Hearing: 03/05/2019 02:30 pm LOB 302	Monitor
HB 724	Rep Read	Relative to certain rights of employees.	This bill bans credit checks for any employment-related decision, requires employers to allow a certain amount of rest between work shifts, gives employees advance notice of work schedules, and increases the minimum hourly rate of tipped employees to the minimum hourly rate for all employees	Labor	Committee Report: Inexpedient to Legislate (Vote 19-0; CC)	Oppose
SENATE BILLS						
LSR/ BILL #	**PRIME SPONSOR**	**TITLE**	**ANALYSIS**	**COMMITTEE**	**STATUS**	**POSITION**
SB 1	Sen Feltes	Relative to family and medical leave.	This bill establishes a system of paid family and medical leave insurance.	Finance	Senate: Passed House Majority Committee Report: Ought to Pass (Vote 12-7; RC)	Oppose
SB 4	Sen Feltes	Relative to the group and individual health insurance market.	This bill establishes the provisions of the Patient Protection and Affordable Care Act of 2009, Public Law 111-148, as amended in statute.	Health and Human Services		Oppose
SB 10		establishing the state minimum hourly rate based on whether an employer offers paid sick days to an employee.	This bill sets the minimum hourly rate paid to employees based on whether or not the employer offers paid sick days to an employee.	Commerce		Monitor

SB 54	Sen Bradley	Relative to the road toll bond requirements for licensed fuel distributors.	This bill allows for an exemption for certain licensed fuel distributors from obtaining a surety bond for road toll liability.	Transportation	Senate: Passed	Oppose
SB 59	Sen Birdsell	Adding post traumatic stress disorder and acute stress disorder to the definition of "injury" for purposes of workers' compensation and reestablishing the commission to study the incidence of post-traumatic stress disorder in first responders.	This bill adds post-traumatic stress disorder and acute stress disorder to the definition of "injury" for purposes of workers' compensation. This bill also reestablishes the commission to study the incidence of post-traumatic stress disorder in first responders and whether such disorder should be covered under workers' compensation.	Commerce	Senate: Passed	Oppose
SB 64	Rep Morgan	Relative to anti-fraud plans maintained by insurance companies.	This bill requires that insurance companies submit their written antifraud plan to the commissioner of the department of insurance, upon request.	Commerce		Monitor
SB 99	Sen Cababaugh	Relative to gainful employment and partial disability in workers' compensation.	This bill clarifies the definition of gainful employment for purposes of workers' compensation. This bill also clarifies compensation for temporary partial disability and permanent partial disability.	Commerce	Senate: Passed	Oppose
SB 100	Sen Fletes	Relative to discrimination in employment based on criminal background checks.	This bill prohibits discrimination in employment based on criminal background checks.	Commerce		Oppose
SB 150	Sen Starr	Authorizing individuals and certain businesses to purchase health insurance from out-of-state companies.	This bill authorizes individuals and certain businesses to purchase health insurance from out-of-state companies. The bill grants rulemaking authority to the insurance commissioner for the purposes of the bill.	Commerce		Monitor
SB 151	Sen Feltes	Establishing an administrative hearing procedure and penalty for an employer who fails to make payment of wages or who fails to secure workers' compensation coverage.	This bill establishes an administrative hearing procedure and penalty for employers who fail to make payment of wages as required by law and for employers who fail to secure required workers' compensation coverage.	Commerce	Senate: Passed	Monitor
SB 189	Sen Kahn	Relative to the insurance premium tax.	This bill establishes a flat rate on surplus lines policies for purposes of the insurance premium tax.	Ways and Means	Senate: Passed	Monitor

SB 194	Rep Morgan	Relative to the insurance data security law.	This bill establishes the insurance data security law.	Commerce	Committee Report: Ought to Pass, 03/14/2019; SC 13	Monitor
SB 195	Sen Kahn	Relative to insurance continuing education.	This bill changes the manner in which the commissioner pays the expenses of compensating the continuing education advisory councils. This bill also adds submission fees for continuing education courses.	Commerce	Senate: Passed	Support
SB 197	Sen Watters	Relative to noncompete agreements for low-wage employees.	This bill prohibits an employer from requiring a low-wage employee to enter into a noncompete agreement.	Commerce	Senate: Passed	Monitor
SB250	Rep Morgan	Relative to forgery of a certificate of insurance.	This bill makes issuance of a fake or counterfeit certificate of insurance a felony offense.	Commerce	Senate: Passed	Monitor
SB251	Sen Kahn	Relative to the life and health insurance guaranty association.	This bill makes changes recommended by the National Association of Insurance Commissioners to their model law on the Life and Health Insurance Guaranty Association of 1996.	Commerce		Monitor
SB316	Sen Hennessey	Relative to the protection of personal information.	This bill establishes criminal penalties for failure to protect another person's personal information.	Judiciary	Committee Report: Rereferred to Committee, 03/14/2019; Vote 5-0; CC; SC 13	Monitor
CACR 10	Rep Schamberg	Relating to a state income tax. Providing that revenue from any state income tax shall be returned to the cities, towns, school districts, and counties to assist in property tax relief.	This constitutional amendment concurrent resolution provides that if an income tax is enacted in the state it can only be for the purpose of reducing real estate property taxes by the amount raised.	Ways and Means	Committee Report: ITL	Oppose

Education Committee

Education – Report to Board of Directors – 3/14/19

- Professional Development Days
  - 14 sponsorships for a total of $15,500. – Last year $12,000. 8 Tickets given to each sponsor. Appears to be a hit!
  - All hotel contracts have been signed
  - Using more volunteer instructors this year
    - Ann Roemer – Hartford Steam Boiler – HO equipment breakdown/identity theft
    - Thomas Brothers – Liberty Mutual – Contractual Risk Transfer
  - Russell Hilliard, Esquire is unable to act as judge of our mock trial in Bartlett. In his place, Charles Grau, Esquire, also of Upton & Hatfield, will be joining us.
  - Registrations are coming in – numbers to date:
    - 5/7 – Concord = 17
    - 5/9 – Bartlett – 10
    - 5/14 – Manchester – 11
    - 5/16 – Hampton – 9
  - Article about PDD was included in Premium and will be the featured article in the 3/15 Burst
  - Courses approved for CE in NH, ME & VT
- Judy Durst along with the help of Kendra Cote of the Education Committee, are working on two new designation programs that will be owned by NHAIA. This is in response to the students who have finished the ACSR and AAI programs and want more but don't want to start CPCU. They are entitled: Commercial insurance Advanced Studies or CIAS; and Personal Insurance Advanced Studies or PIAS. It will include a combination of webinars, classes, case study/take home exam. More information will be available as the program is developed. Looking to roll it out at the Annual Meeting.
- Judy is working on an on-line program to provide multiple quizzes and exams for individuals studying for their P & C Licensing exam. It would allow us to charge a fee for the product. Working with ClassMarker software. No cost to NHAIA for up to 100 exams. We currently charge $50 for an ExamFX product code which we purchase for $23.50

Building Update

6 Garvin Falls Road

Income and Expense
9/1/2018 – 2/28/2019

Rents:

Rents	Monthly	Total
NHAIA	$3,000.00	$18,000.00
Align	$1,400.00	$8,400.00
Exit Realty	$1,300.00	$7,800.00
Market Street	$1,255.71	$7,534.26
Reliable Insurance	$1,000.00	$6,000.00
Visconti Marketing	$250.00	$1,500.00
Winks	$225.00	$1,350.00
Donlon and Associates (Vacated)		$1,250.00
Mattock Law	$250.00	$1,000.00
Total	**$8,680.71**	**$52,834.26**

Expenses:

Expenses	Total
Taxes (9 Months worth)	$13,975.39
Interest Payment	$6,347.37
Landscape and Plowing	$5,042.25
Electric	$4,380.33
Repairs and Maintenance	$3,497.17
Building Supplies	$3,309.15
Gas	$1,553.93
Dumpster	$513.00
Water	$318.22
Total	**$38,936.81**

- Averaging $2,300 to the positive each month.

InsurPAC

2019 InsurPAC Contributors

Centennial Club ($1000-$2499)
Christopher Nicolopoulos

Gold Club ($500-$999)
Will Infantine

Founders Club ($150-$249)
Joan Pageau

Independent Insurance Agents & Brokers of America, Inc.
20 F Street NW, Suite 610 • Washington, DC 20001
202.863.7000 • F:202.863.7015 • InsurPac@IIABA.net

Name: _____ Title/Occupation: _____

Business Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Email: _____ Phone: _____

Suggested Contribution: $ ❑ I am a Young Agent

One-Time Payment (Check or Credit Card)

❑ $5,000 Millennium Club ❑ $1,000 Centennial Club ❑ $250 Pioneer Club ❑ $100 Contributor

❑ $2,500 Platinum Club ❑ $500 Gold Club ❑ $150 Founders Club ❑ $_____(Other)

OR

Monthly Payments (credit card withdrawal on the 15th of each month)

Start Month: _____/2018 ❑ $250 Month ❑ $50 Month ❑ $10 Month

End Month: _____/_____ ❑ $100 Month ❑ $25 Month ❑ $_____Month

❑ No end date

Personal Check (payable to "InsurPac")

Credit Card: ❑ American Express ❑ VISA ❑ Mastercard

Card Number: _____ CVV Code: _____ Exp. Date: _____/_____

****All forms of payment must be by personal check, credit card or non-incorporated LLC or Partnership check.**

Authorized Signature: _____ Date: _____/_____/_____

Contributions or gifts to InsurPac are not deductible as charitable contributions for purposes of federal income tax. Federal law requires us to use our best efforts to collect and report the name, mailing address, occupation and employer for each individual whose contributions aggregate in excess of $200 in a calendar year. Your contribution should be considered strictly voluntary.

Legislative Conference

Washington D.C.

Independent Insurance Agents & Brokers of America, Inc.

Login

Shopping Cart 0 items (cart.aspx)

Back | Actions | Register

2019 Big "I" Legislative Conference

REGISTRATION IS NOW OPEN

Early-bird Deadline - March 8, 2019

Welcome to the 2019 Big "I" Legislative Conference Registration!

PLEASE READ BEFORE PROCEEDING TO THE NEXT PAGE.

RegistrationTips:

- **Using your Big "I" login and password to save time and money when registering?:**

  Please verify the pre-populated information is accurate. This information is used to produce your name badge. If you don't know your login and password you may submit an email request to Logon@iiaba.net (mailto:Logon@iiaba.net) or click register to continue.

- **Registering a Guest/Spouse:** *(if applicable)*

All registration categories require a response. Please select all events you and your guest/spouse (if applicable) plan to attend.

This will ensure we have an accurate food and beverage count. **If a registration category does not apply to you or your guest/spouse, please select the "Not Applicable" checkbox.** If registering more than one guest, each additional guest will need to be registered separately.

- **Complimentary Registration Discount Code Instructions:** *(if applicable)*

Registrants using a complimentary discount code should be registered separately from a paying attendee shopping cart to ensure payment is allocated properly.

If using a COMP Registration Discount Code, following completion of your registration profile information and selecting the functions you plan to attend, click the blue "Add to Cart" button near the bottom left of the screen. You will be advanced to the next page. Near the bottom left, enter your complimentary registration discount code in the "Promotional Claim Code" field.Then click "Apply". To complete your registration and checkout, click the blue "Checkout" button located on the bottom right of the screen.

- **Cancellation/Refund Policy:**

All registration cancellations and refund requests must be submitted in writing to Lisa.Johnson-Briggs@iiaba.net (mailto:Lisa.Johnson-Briggs@iiaba.net) **by Monday, April 8, 2019**. There is a $75.00 per person administrative charge assessed for cancellations. No-shows without prior notification are not entitled to a refund.

Registration Questions? Email Lisa.Johnson-Briggs@iiaba.net (mailto:Lisa.Johnson-Briggs@iiaba.net)

BIG I Legislative Conference

May 7-11, 2019

SCHEDULE OF EVENTS

Wednesday, May 8

11:30 a.m. - 12:45 p.m.
Young Agents & InsurPac State Chairpersons Legislative Luncheon
Speaker: TBA
Location: Grand Ballroom North, Ballroom Level
Dress: Business Attire

1:15 p.m. - 2:30 p.m.
Legislative Conference Briefing (For Agents and Big "I" State Staff Only)
Location: Grand Ballroom South & Central, Ballroom Level
Dress: Business Attire

4:30 p.m. - 6:00 p.m.
InsurPac Major Donor Reception (by invitation only)
Prominent members of Congress will mingle with VIP InsurPac donors.
Location: TBA
Dress: Business Attire

7:00 p.m. - 8:00 p.m.
Large Agent/Broker & CEO Reception (by invitation only)
Location: Congressional Ballroom C, Ballroom Level
Dress: Business Attire

Thursday, May 9

7:00 a.m. - 8:30 a.m.
Legislative Conference Breakfast
Congressional guest speakers will address breakfast attendees before agents and brokers head to Capitol Hill.
Speaker:
Richard Neal (D-MA), Ways and Means Committee Chairman

7:00 a.m. - 7:30 a.m. - Breakfast
7:30 a.m. - 8:30 a.m. - Program
Location: Grand Ballroom, Ballroom Level
Dress: Business Attire

9:00 a.m.
Big "I" Day on Capitol Hill
Dress: Business Attire

5:00 p.m. - 6:00 p.m.
Legislative Conference Reception
Location: Grand Ballroom North, Ballroom Level
Dress: Business Attire

9:00 p.m. - 11:30 p.m.
YAC Gives Back: Battle of the Bags Cornhole Tournament: A Fundraiser for InVEST Scholarships
Location: TBA
Dress: Casual, Business Casual, or Business Attire

Friday, May 10

8:00 a.m. - 10:00 a.m.
General Session Breakfast
State of the Association Presentation
Best Practices Award of Excellence Presentation

Joe Leahy, Big "I" Chairman
Chairman Leahy will share his perspective on the trends, opportunities and challenges facing the association and the independent agency system.

Speaker:
Chris Wallace, FOX News Sunday

Additional Program Details: TBA

8:00 a.m. - 8:30 a.m. - Breakfast
8:30 a.m. - 10:00 a.m. - Program

Location: Grand Ballroom, Ballroom Level
Dress: IIABA Executive Committee & Staff - Business Attire
All other attendees - Business Casual Attire

8:45 a.m. - 12:00 p.m.
Crop Insurance Company Sponsors Meeting
Location: TBA
Dress: Business Casual Attire

10:00 a.m. - 1:00 p.m.
Future One Meeting
10:00a.m. - 12:00 p.m., Meeting
12:00 p.m. - 1:00 p.m. Lunch
Location: TBA
Dress: Business Casual Attire

11:45 a.m. - 1:30 p.m.
Diversity Luncheon
Location: TBA
Dress: Business Casual Attire

1:00 p.m. - 2:30 p.m.
State Lobbyist Meeting
Location: TBA
Dress: Business Casual Attire

2:00 p.m. - 4:00 p.m.
Board or Directors Spouse/Guest Afternoon Tea
Location: TBA
Dress: Business Casual Attire

3:30 p.m. - 5:30 p.m.
Board of Directors Meeting
Location: Grand Ballroom North & Central, Ballroom Level
Dress: Business Casual Attire

5:30 p.m. - 6:30 p.m.
Board of Directors Reception
Location: TBA
Dress: Business Casual Attire

Saturday, May 11

7:30 a.m. - 8:30 a.m.
Big "I" Reinsurance Company (BIRC) - Board Meeting
13 BIRC Board Members, Officers and Invitees ONLY
Location: TBA
Dress: Business Casual Attire

7:30 a.m. - 8:30 p.m.
Committee Chairs Meeting
Location: TBA
Dress: Business Casual Attire

9:00 a.m. - 3:00 p.m.
Board of Directors Meeting
Location: Grand Ballroom North & Central, Ballroom Level
Dress: Business Casual Attire

3:30 p.m. - 5:00 p.m.
Executive Committee Meeting (CLOSED MEETING)
Location: TBA
Dress: Business Casual Attire