

# Agenda



## 8-8:10 a.m. | Welcome remarks

*Dawn Latham | Iowa Society of CPAs*  
*Heidi DeMarais | EY | 2023-2024 Committee Chair*  
**Bishop AB | Channel 1**

## 8:10-8:25 a.m. | Iowa Insurance Division Update

*Kevin Clark | Iowa Insurance Division*  
**Bishop AB | Channel 1**

## 8:25-9:15 a.m. | Macro Trends Impacting the Insurance Industry

*Marie Carr | PwC*  
**Bishop AB | Channel 1**

## 9:15-9:25 a.m. | Break

## 9:25-10:15 a.m. | Breakout sessions

**Voices of Insurtech Innovation and Investing**  
*Nicole Gunderson | ManchesterStory Group LLC*  
*Susan Hatten | Holmes Murphy (Moderator)*  
*Dan Israel | Global Insurance Accelerator*  
*Ellen Willadsen | Holmes Murphy*  
**Bishop AB | Channel 1**

**FASB/PCOAB/SEC Update**  
*Andrew Pidgeon | Deloitte*  
**Salon 2/3 | Channel 2**

## 10:15-10:25 a.m. | Break

## 10:25-11:15 a.m. | NAIC Update

*Connie Jasper Woodroof | CJW Associates*  
**Bishop AB | Channel 1**

## 11:15-11:30 a.m. | Break

**Attending the bonus session:** Sign the bonus session attendance sheets on the registration tables, pick up your lunch in the pre-function area and return to Bishop AB.

**Not attending bonus session:** Pick up your lunch and be seated at the tables in the pre-function area.

## 11:30 a.m.-12:20 p.m. | Optional BONUS lunch session: Ethics, Integrity and Accountability 2024: How Are We Doing?

*Tom Westbrook | Learn Associates LLC*  
**Bishop AB | Channel 1**  
**VSCPA-specific ethics session | Channel 2**

## 12:20-12:30 p.m. | Break

## 12:30-1:20 p.m. | Ethics, Integrity and Accountability 2024: It Could Happen To You

*Tom Westbrook | Learn Associates LLC*  
**Bishop AB | Channel 1**  
**VSCPA-specific ethics session | Channel 2**

## 1:20-1:30 p.m. | Break

## 1:30-2:20 p.m. | Breakout sessions

**ESG: An Overview and Regulatory Developments**  
*Jon Poth | EY*  
**Bishop AB | Channel 1**

**Tax Update**  
*Andy Seydel | EY*  
**Salon 2/3 | Channel 2**

## 2:20-2:30 p.m. | Break

**Reminder:** Sign the afternoon attendance sheets.

## 2:30-3:20 p.m. | Breakout sessions

**2024 Washington Political and Legislative Update**  
*Scott McLucas | KPMG*  
**Bishop AB | Channel 1**

**Principles Based Bond Project**  
*Kevin Clark | Iowa Insurance Division*  
**Salon 2/3 | Channel 2**

## 3:20-3:30 p.m. | Break

## 3:30-4:20 p.m. | Hot Topics Panel

*Mike Downing | Athene*  
*Kelli Eddy | Farm Bureau Financial Services*  
*Scott Jean | EMC Insurance Company*  
*Patti Martin | Deloitte (Moderator)*  
**Bishop AB | Channel 1**