

**2017 SSA Annual Conference – Bonita Springs, FL**

**Monday, July 17, 2017**

2:00 pm – 5:00 pm      Registration/Information Desk

**Tuesday, July 18, 2017**

8:00 am – Noon      Golf outing

8:00 – 11:00 am      Shareholder Services 101, Unclaimed Property & Annual Meetings courses

8:00 am - 4:00 pm      Registration/Information Desk

8:00 am – Noon      Hospitality Suite

Noon – 1:00 pm      LUNCH IS ON YOUR OWN

1:00 – 1:15 pm      **Welcome - SSA Executive Director & Update from the SSA President**

1:15 – 2:00 pm      **Keynote Speaker**

2:00 – 2:45 pm      **Are you ready for T+2?**

2:45 – 3:30 pm      **NYSE/NASDAQ – Challenging Corporate Actions**

3:30 - 3:45 pm      Quick Break!  
*Sponsored by Wells Fargo Shareowner Services*

3:45 – 4:30 pm      **Securing your safety among “Cyber Sharks”**

4:30 – 5:30 pm      Free Time

5:30 – 6:00 pm      Cocktails with First Time Attendees

6:00 – 7:00 pm      Welcome Reception for All Attendees – Golf Awards

7:00 – 8:30 pm      Dinner in Margaritaville!

8:30 pm.      After dinner lawn games

### Wednesday, July 19, 2017

7:00 am - 2:30 pm	Registration/Information
7:00 - 8:30 am	Breakfast Buffet
8:00 – 8:05 am	<b>Intro from Executive Director</b>
8:05 – 9:00 am	<b>The Distinction of OBO/NOBO</b>
9:00 – 10:15 am	<b>An update from the Securities &amp; Exchange Commission</b>
10:15 – 10:45 am	Networking Break & Sponsor Exhibits <i>Sponsored by Wells Fargo Shareowner Services</i>
10:45 – 11:30 am	<b>Industry Initiatives &amp; ANPR Potential Costs</b>
11:30 - 1:00 pm	Networking Lunch & Vendor Exhibits
1:00 - 1:45 pm	<b>Proxy Process &amp; Proxy Access</b>
1:45 – 2:30 pm	<b>The Dodd-Frank Basics – Where are we now?</b>
2:30 – 2:45 pm	Quick Break! <i>Sponsored by Wells Fargo Shareowner Services</i>
2:45 – 3:30 pm	<b>Catching the Waves of Virtual Annual Meetings</b>
3:30 – 4:30 pm	<b>Open Forum: Here's your chance to ask your questions!</b>
4:30 - 6:00 pm	Free Time
6:00 pm -	Vendor dinners

### Thursday, July 20, 2017

7:30 am - Noon	Registration/Information
7:00 - 8:00 am	Breakfast Buffet
8:00 - 9:30 am	<b>Current Trends in the Sea of Unclaimed Property</b>
9:30 - 10:00 am	Networking Break <i>Sponsored by Wells Fargo Shareowner Services</i>
10:00 – 10:45 am	<b>A Recap of Cost Basis &amp; IRS Reporting</b>
10:45 – 11:45 am	<b>Succession Planning: Are you prepared?</b>

11:45 – 12:00 pm

**Conference Wrap-up & Introduction of 2018 Conference Chair**