



2019 Conference Agenda

Monday, July 15

6:30 pm - 9:30 pm Networking Event (Sunset Cruise)

Tuesday, July 16

7:30 am - 12:00 pm Networking Event (option for golf or historic walking tour)

8:30 am - 12:00 pm SSPC Exam

1:00 pm - 2:00 pm Networking and Exhibits

2:00 pm - 2:45 pm Opening Ceremony with guest, Senator John C. Astle

2:45 pm - 3:45 pm Roles and Responsibilities of Issuer and Agent
An in-depth look at specific responsibilities on topics like GDPR, audits, P&I assessments, data security, record retention and conversions.

3:45 pm - 4:45 pm Latest Technologies
With today's new shareholders doing more entrepreneurial investing, what technologies are available to attract the next generation (mobile apps, virtual meetings, marketing tools, and analytics).

6:15 pm - 6:45 pm First Time Attendees Reception

6:45 pm - 7:30 pm Welcome Reception

7:30 pm - 9:30 pm Networking Dinner (Crab Bake)

Wednesday, July 17

8:00 am - 9:00 am Networking Breakfast

9:00 am - 10:00 am Legal and Regulatory Updates
Updates, changes, impacts and requirements of regulatory bodies that govern the shareholder services industry.

10:00 am - 11:00 am	Unclaimed Property Update on changes and impacts.
11:00 am - 11:30 am	Networking Break and Exhibits
11:30 am - 12:30 pm	Cutting vs. Containing - Best Practices for Cost Savings Suggestions on cost saving ideas without compromising customer service. Best use of internal and external partners to contribute to the bottom line.
12:30 pm - 1:45 pm	Networking Lunch and Exhibits
1:45 pm - 2:45 pm	Better Shareholder Communications Effective and creative ways to communicate with shareholders (technology, websites, incentives, buck slips); what works and what hasn't worked.
2:45 pm - 4:30 pm	Open Forum An opportunity to ask and answer questions, share best practices and creative ideas.
4:30 pm - 6:00 pm	Networking Event (TBD)

Thursday, July 18

8:00 am - 9:00 am	Networking Breakfast and Exhibits
9:00 am - 10:00 am	Unclaimed Property State Panel
10:00 am - 11:00 am	Annual Meeting Best Practices Shareholder registration, virtual meetings, retail vote, engaging retail holders, etc.
11:00 am - 11:30 am	Networking Break and Exhibits
11:30 am - 12:30 pm	Industry Hot Topics Cybersecurity, crowdfunding, RegA + Offerings, crypto currency and block chain processing.
12:30 pm - 12:45 pm	Conference Wrap-up
