



Independent Insurance Agent

Agency Management Institute

August 14-15, 2024
Hyatt Place/Hyatt House
Charleston, SC

Wednesday, August 14, 2024

7:30 am – 8:00 am

REGISTRATION

8:00 am – 12:00 pm

Section 1

Strategic Planning

Rebecca Lathrop, CIC, CPIA

12:15 pm – 1:15 pm

Lunch (On Your Own)

1:15 pm – 5:15 pm

Section 2

Talent Acquisition & Development

Rebecca Lathrop, CIC, CPIA

5:15 pm – 5:30 pm

Examination Review

Thursday, August 15, 2024

7:30 am – 8:00 am

Coffee & Rolls

8:00 am – 10:00 am

Section 3

Client Acquisition & Retention

David Walker, CIC, CRM

10:00 am – 12:00 pm

Section 4

Technology Utilization

David Walker, CIC, CRM

12:00 pm – 1:00 pm

Lunch (On Your Own)

1:00 pm – 2:00 pm

Section 4

Technology Utilization

David Walker, CIC, CRM

2:00 pm – 5:00 pm

Section 5

Ethical Responsibility

David Walker, CIC, CRM

Educational Consultant: Becky McCormack, CIC, CPCU, AAI, AINS