



# Agency Mergers and Acquisitions Symposium

8:00 am - 9:00 am

**Registration and Breakfast**

9:00 am - 9:45 am

**State of the Industry: Economic & Industry Overview**

Kevin P. Donoghue, CFA, CPA, CIC, Managing Director, Mystic Capital Advisors Group, LLC

9:45 am - 10:30 am

**Valuation & Tax Considerations**

Kevin W. Smith, CPA (IL and CA), Director, Mystic Capital Advisors Group, LLC  
Gerard Bobal, CPA, Partner, WeiserMazars LLP

10:30 am - 11:00 am

**Networking Break**

11:00 am - 11:45 am

**Deal Structuring for Success**

Mathew K. Klossner, Director, Mystic Capital Advisors Group, LLC

11:45 am - 12:30pm

**The Nuts & Bolts: Doing Your Due Diligence**

Lorna L. Gunnensen, CPA, CVA, CPCU, CIC, CRM (IL, TX and NY), Director, Mystic Capital Advisors Group, LLC

12:30 pm - 1:30 pm

**Networking Luncheon**

1:30 pm - 2:15 pm

**Navigating the Legal Process**

2:15 pm - 3:00 pm

John P. Corrigan, JD, MBA, CPA (TX and NY), Partner, Corrigan & Baker, LLC  
Stan Kinnett II (IL, CA, NY), Chief Corporate Counsel, AssuredPartners, Inc.

**Making It Work: M&A Funding**

Matt Sprang, Senior Vice President and Agency Banking Leader, Westfield Bank  
Rick Dennen, Founder, President, and Chief Executive Officer, Oak Street Funding  
Kirsten Petras (TX and NY), Strategic Markets Operations Manager, Oak Street Funding

3:00 pm - 3:15 pm

**Networking Break**

3:15 pm - 3:45 pm

**Internal Perpetuation Strategies**

Kevin P. Donoghue, CFA, CPA, CIC, Managing Director, Mystic Capital Advisors Group, LLC

3:45 pm - 5:00 pm

**Perspectives on M&A: Bringing It All Together**

Paul Vredenburg, CPA, AAI (IL, TX, and NY), Executive Vice President & Chief Acquisition Officer, AssuredPartners, Inc.

John P. Corrigan, JD, MBA, CPA (TX and NY), Partner, Corrigan & Baker, LLC  
Benjamin Newman (NY), Senior vice President, Corporate Development, Marsh & McLennan Agency