



Agency Mergers and Acquisitions Symposium

8:00 am - 9:00 am

Registration and Breakfast

9:00 am - 9:30 am

State of the Industry: Economic & Industry Overview

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

9:30 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 pm - 12:30 pm

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