



# Agency Mergers and Acquisitions Symposium

8:00 am - 9:00 am

9:00 am - 9:45 am

9:45 am - 10:30 am

10:30 am - 11:00 am

11:00 am - 11:30 am

11:30 am - 12:15 pm

12:15 pm - 1:15 pm

1:15 pm - 2:00 pm

## Registration and Breakfast

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

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

### Valuation & Tax Considerations

Kevin W. Smith, CPA (IL and CA), Director, Mystic Capital Advisors Group, LLC

## Networking Break

### Internal Perpetuation Strategies

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

### Deal Structuring for Success

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

## Networking Luncheon

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

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

2:00 pm - 2:45 pm

Capital Advisors Group, LLC

**Navigating the Legal Process**

John P. Corrigan, JD, MBA, CPA (TX and NY), Partner, Corrigan & Baker, LLC

Stan Kinnett II (IL, CA, NY), Chief Corporate Counsel, AssuredPartners, Inc.

2:45 pm - 3:00 pm

**Networking Break**

3:00 pm - 3:45 pm

**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

3:45 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