

## FALL CONFERENCE

October 26-28, 2025 | Mystic Hilton, Mystic, CT

	Track A: Accounting	Track B: Customer Service	Track C: Tech/Management	
Monday, October 27th				
7:00 - 8:00	Registration & Breakfast			
8:00 - 9:30	Opening Session - Vertafore: What's New			
9:45 - 10:45	What's New with Accounting Kelly Shields	AgencyOne Kevin Wheeler	Vertafore & AI Colleen Willhight	
11:00 - 12:00	My Agency Reports Kelly Shields	CL: Import and Export / Submission: New and Renewal Kevin Wheeler	Agency Users & AI, Cool Tools and Tech Joyce Sigler, Ben Lynds, More	
12:00 - 1:00	Lunch			
1:15 - 2:15	Year-End Tips & Tricks Kelly Shields	Views in AMS360 / Working in eForms Kevin Wheeler	Data Integrity/Cleanup Joyce Sigler	
2:30 - 3:30	Accounting Corrections Deep Dive Kelly Shields	AMS360 Tips & Tricks Kevin Wheeler	Auditing Joyce Sigler	
3:45 - 5:00	Roundtables Download   AI   Accounting   AgencyOne   ImageRight   Auditing   AMS360 Admin			
5:00 - 6:00	Networking Reception Cocktails & Light Tapas			
Tuesday, October 28th				
7:00 - 8:00	Breakfast & Networking			
8:00 - 9:30	Service for Non- Service Personnel Kelly Shields	AgencyZoom 101 Sean Inutsuka	ReferenceConnect Nellie Massoni	ImageRight 101 Colleen Willhight
9:45 - 11:00	Direct Bill Commission Challenges Kelly Shields	AgencyZoom 201 Sean Inutsuka	TransactNOW eDocs and Claims Download Nellie Massoni	ImageRight 201 Colleen Willhight