

# NetVU New England

NetVU Chapter

Newport Harbor Hotel and Marina | Newport, Rhode Island | Oct 24-26, 2021

## Sunday, October 24

3:30pm - 5:00pm

Registration

5:00pm - 6:30pm

Meet and Greet Reception – Dinner on Your Own

## Monday, October 25

7:00am - 8:00am

Breakfast and Registration

8:00am - 8:30am

Opening Session | What's New w/ Vertafore

Brett Chenail

8:30am - 9:45am

### General Sessions

A. Creating Specialty Lines of Business

Angela Painter

B. All Things Download

Joyce Sigler

C. What's New in AMS360 Accounting

Janice Pierson

9:45am - 11:00am

### General Sessions

A. Auditing Your Workflows

Angela Painter

B. All Things TransactNOW, eDocs

Nellie Massoni

C. Service Agreements

Janice Pierson

11:00am - 11:15am

Break – Meet Your Sponsors

11:15am - 12:30pm

### General Sessions

A. Customized Reporting Using Target Lists

Angela Painter

B. Proposal Builder Part 1

Carla Jarombek

C. Trust Transfer

Janice Pierson

12:30pm - 1:30pm

Lunch – Hear from Sponsors

1:30pm - 2:45pm

### General Sessions

A. Activities and Documents

Angela Painter

B. Proposal Builder Part 2

Carla Jarombek

C. DocuSign, ePayPolicy, Outlook Plugin

Joyce Sigler

2:45pm - 3:00pm

Break – Meet Your Sponsors

3:00pm - 4:15pm

### General Sessions

A. Utilities Your Team Should Be Using

Angela Painter

B. Cyber Security

Ryan Smith

C. InsurLink – Setting Up

Carla Jarombek

5:00pm - 6:00pm

Cocktails & Light Tapas - Raffle Prizes - Must Be Present to Win - Dinner on Own

## Tuesday, October 26

7:00am - 8:00am

Breakfast

8:00am - 9:15am

### General Sessions

A. Managing a Remote Team

Angela Painter

B. ReferenceConnect – Are You Using It?

Joyce Sigler

C. Vertafore Client Communications

Carla Jarombek

9:15am - 9:30am

Break – Last Chance to Visit Sponsors!

### General Session

9:30am - 10:45am

A. All Things Outlook – Plugin, QuickParts...

Angela Painter

B. Estimated Revenue

Janice Pierson

C. Proposal Builder Part 1

Carla Jarombek

10:45am - 12:00pm

### General Sessions

A. Tips and Tricks, Dos and Don'ts

Joyce Sigler

B. Accounting Round Table

Janice Pierson

C. Setting Up Proposal Builder Part 2

Carla Jarombek