

The IBA West LEADERSHIP & SALES CONFERENCE

Presented by the Young Brokers & Agents Committee
bringing you 36 years of great conferences



Marriott Napa Valley Hotel & Spa,
Napa Valley, CA • June 9-11, 2011
36th Young Brokers & Agents Conference

Six Reasons to Attend

1. Leadership & Sales Training

2. Specialized CE Seminars –
Earn Up to 16 CE Credits

3. Network with the Top Insurance
Company Representatives

4. Be a Recognized Professional
in this Specialized Industry

5. Attend Product Tradeshow

6. Jump Start Your Career

We're expecting a sold-out
conference so book early

**NEW! INCLUDES FOUR 1-HOUR
GROUP SALES COACHING WEBINARS**

Marriott Napa Valley Hotel & Spa, Napa Valley, CA June 9-11, 2011

Come see why everyone is talking about the YBA Leadership & Sales Conference, and why the Independent Insurance Agents & Brokers of America named ours the "Nation's Best Conference" for nine years!

Voted 2010 Nation's Best Conference

"The IBA West Leadership & Sales Conference provides insurance professionals the opportunity to learn and network in a relaxed and fun environment. I would highly recommend the conference for any agent, young or old."

Steve Shea, CISC
Principal, Barney & Barney, LLC
San Diego, CA

Who Should Attend

- Insurance Producers, Principals, and CSRs
- Company Underwriters and MGAs
- Risk Managers
- New Agents who need professional development training

Register now at www.YBAC.net



Pending 16 CE Credits for Property/Casualty
Licenses (AK, CA, NV, OR and WA)
Pending 7 CE Credits for Life Licenses (AK, CA,
NV, OR and WA)
13 hours of Leadership & Sales Training



The IBA West Young Brokers & Agents Committee would like to extend special thanks to our Grand Sponsors Monarch E&S Insurance Services and State Compensation Insurance Fund.



Welcome

As the Chair of the Young Brokers and Agents Committee I would like to invite you to join us for the **2011 Leadership & Sales Conference** brought to you by the IBA West Young Brokers & Agents to be held June 9-11 at the Napa Valley Marriott Hotel & Spa in beautiful Napa Valley, CA.

Whether you are a first time attendee or a veteran to YBAC you will find the cost of this conference to be minimal when weighed against the value you get in return. Voted "Nation's" Best Conference nine times by IIABA, including 2010, where else can you attend a conference for 3 days, get up to 16 hours of CE or **Leadership & Sales** education, 8 meals, including a gourmet dinner on the Napa Valley Wine train, combined with all the entertainment you can handle for such a low registration fee?

Don't miss out on the great networking events throughout the Conference as well as insider information from industry leading speakers and special company guests. Take a look inside for more info.....

I'll be seeing you in Napa Valley!

Denton Christner
2011 YBA Committee Chair

Your Registration Includes

- **Education & Professional Development Workshops**
- **Four 1-Hour Group Sales Coaching Webinars (Post Conference)**
- **First Time Attendees Reception**
- **Sponsors Reception**
- **Welcome Reception**
- **Casino Royale Night**
- **Texas Hold'em Tournament**
- **Two Breakfasts, Three Luncheons**
- **Sponsor Tradeshow**
- **Friday Night Napa Valley Wine Train & Dinner**
- **Day Care for Children 4 and over On the Wine Train**
- **Saturday Winery Tasting & Dinner**



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36th Young Brokers & Agents Conference

NEW!!! Leadership & Sales Conference

Tough times call for successful professionals. The 2011 Leadership & Sales Conference will put producers on the right track to success. Professional development curriculum offers first-rate sales, service and leadership training. Agency owners can jump start the careers of their employees by sending them to the conference to learn from the industry's best and the brightest.

CE Track

Specialized CE seminars are offered concurrently with the Professional Development/Sales Track. Earn up to 16 CE Credits.

TOPIC	Professional Development & Sales	Continuing Education
Day One	Selling in 2011 – Thinking Outside of the Box Setting High Personal Goals You're Guaranteed to Exceed	Certificates of Insurance: Just When You Thought it Was Safe (3 CE) Workers Compensation: Competitive Strategies and Market Update (3 CE)
Day Two	Dealing Effectively With an Objection Designing a Sales Driven Application	The Next Generation: A Young Agents Leadership Guide (3 CE) Tales From the Insurance Fraud Crypt (1 CE)
Day Three	How to Grow Your Agency Social Media/Search Engine Optimization	New Laws Briefing (1 CE) Classification & Valuation of Property (1 CE) BOP Changes (1 CE) Winery Risk Management Walking Tour (3 CE)

Conference Agenda

PROFESSIONAL DEVELOPMENT/SALES TRACK – SOARING TO SALES SUCCESS

Thursday & Friday – Jeff Wodika, CIC, Chairman & CEO Casswood Insurance Agency & National Program Director, Dynamics of Selling



Jeff Wodika

Saturday – Instructed by Cheryl Koch, CPCU, CIC, AAI, ARM, API, AAM, AIM AIS, ARP, ACSR, AFIS, Owner, Agency Management Resource Group & Managing Director IBA West Education/ Insurance Skills Center



Cheryl Koch

CONTINUING EDUCATION

– Classes, unless noted, Instructed by **Cheryl Koch, CPCU, CIC, AAI, ARM, API, AAM, AIM AIS, ARP, ACSR, AFIS, Owner, Agency Management Resource Group & Managing Director IBA West Education/ Insurance Skills Center**

Thursday, June 9

8:00am - 5:00pm

Conference Registration

Grand Sponsor: State Compensation Insurance Fund

T-Shirts – Emerald Sponsor: Bliss & Glennon, Inc.

Registration Bags – Ruby Sponsor: The Greenspan Company/Adjusters International

Flash Drives – Sponsor: Available

Door Prizes – Sponsor: Available

Pick up your conference materials, shirt and goodies.

8:00am – 5:30pm

Exhibitor Display Set up & Tradeshow (unstaffed displays)

9:00 – 11:50am

Workshop – PD/SALES TRACK – Selling in 2011 – Thinking Outside of the Box

Sponsor: Available

9:00 – 11:50am

Workshop – CE TRACK– Certificates of Insurance: Just When You Thought it Was Safe (3 CE)

Emerald Sponsor: IBA West Education/Insurance Skills Center

9:50 – 10:00am

Morning Break

Gold Sponsor: EMPLOYERS



12:00 – 1:30pm

Networking Luncheon

Emerald Sponsor: Swett & Crawford

1:40 – 4:30pm

Workshop – PD/SALES TRACK – Setting High Personal Goals You're Guaranteed to Exceed

Sponsor: Available

1:40 – 4:30pm

Workshop – CE TRACK – Workers Compensation: Competitive Strategies and Market Update (3 CE)

Sponsor: Available

2:50 – 3:00pm

Afternoon Break

Gold Sponsor: IBA Burbank/Glendale/Pasadena

4:30 – 6:30pm

Open (Networking by Appointment)

6:30 – 7:00pm

First Time Attendees Reception

Ruby Sponsor: Sequoia Insurance Company

Learn how to get the most out of your conference experience.

6:30 – 7:00pm

Sponsors Reception

Sponsor: IBA West Service Corp

Thank you Sponsors! Please stop by and find out how to get more bang for your buck.

7:00 – 8:00pm

Welcome Reception

Emerald Sponsor: Capital Insurance Group

Don't miss this opportunity to see old friends and to make some new ones as we kick off another exciting conference.

7:30 – 10:00pm

YBA 7th Annual Texas Hold'em Tournament

Grand Sponsor: Monarch E&S Insurance Services

You gotta know when to hold'em and know when to fold'em in the 7th Annual YBA Texas Hold'em Tournament with professional dealers, a small buy-in and timed play to keep things moving.

8:00 – 10:00pm

YBA Casino Royale

Grand Sponsor: State Compensation Insurance Fund

Her Majesty's Secret Service invites you to spend a magical evening at the YBA Casino Royale.

Friday, June 10

7:30 – 9:00am

Continental Breakfast – Networking Appointments

Emerald Sponsor: FirstComp

Start your day off right with a light, healthy breakfast. Spouses and children are invited.

7:30 – 11:30am

Conference Registration

8:00 – 5:30pm

Exhibitor Tradeshow (unstaffed displays)

9:00 – 11:50am

Workshop – PD/SALES TRACK – Dealing Effectively With Any Objection

Ruby Sponsor: AFCO/Prime Rate Premium Finance

9:00 – 11:50am

Workshop – CE TRACK – The Next Generation:

A Young Agents Leadership Guide (3 CE)

Sponsor: Available

9:50 – 10:00am

Morning Break

Gold Sponsor: United States Liability Insurance Group

12:00 – 1:30pm

Thank the Sponsors Luncheon

Emerald Sponsor: Insurance Journal

All attendees join YBA Chair **Denny Christner** in recognizing and thanking our conference sponsors. Then don't miss our expert Mentor Panel featuring IBA All-Stars **Tim Manaka, Jr., Andrew Valdivia, John Morey and Jim Armitage.**



Andrew Valdivia



John Morey



Jim Armitage

1:40 – 2:30pm

Workshop – PD/SALES TRACK – Designing a Sales Driven Application

Gold Sponsor: Harry W. Gorst Co., Inc. & Compass Insurance Group

1:40 – 2:30pm

Workshop – CE TRACK – Tales From the Insurance Fraud Crypt (1 CE)

Sponsor: Available

2:30 – 4:00pm

Open (Networking by Appointment)

4:00 – 5:30pm

YBA Trade Show

Sponsor: Available

Visit the Ruby, Emerald, Diamond, Platinum and Grand Sponsors, while enjoying a glass of wine. Complete your "Punch Card" for a chance to win a **Mini HD Video Camera.**

5:30 – 9:30pm

Napa Valley Wine Train –

Welcome to the Wild Wild West

Grand Sponsor: Monarch E&S Insurance Services

The Napa Valley Wine Train is Napa's most unique restaurant. The train itself is a collection of early 20th Century rail cars that are pure Americana. The Leadership & Sales Conference will charter the wine train for our Wild Wild West event.

Saturday, June 11

7:00 – 7:45am

Morning Java

Gold Sponsor: Imperial Credit Corporation

Not quite ready for breakfast? We've got hot coffee and tea to get your motor running. Quiet please!

7:30 – 9:00am

Buffet Breakfast – Networking Appointments

Emerald Sponsor: Bliss & Glennon, Inc.

Rejuvenate and refresh after your evening of fun! Don't miss another great networking opportunity.



7:30am – 1:30pm

Exhibitor Tradeshow (unstaffed displays)

9:00 – 9:50am

Workshop – CE TRACK – New Laws Briefing (1 CE)

Instructed by: Steve Young, Esq.,

IBA West SVP & General Counsel

Ruby Sponsor: KM2 Communications

9:00 – 10:50am

Workshop – PD/SALES TRACK – How to Grow Your Agency

Instructed by: Cheryl Koch, CPCU, CIC, AAI, ARM, API, AAM, AIM, AIS, ARP, ACSR, AFIS, Owner, Agency Management Resource Group & Managing Director IBA West Education/Insurance Skills Center along with Robert Garden, Partner & Ron Packer, Partner, 1440 Group Inc.

Ruby Sponsor: 1440 Group Inc.

10:00 – 10:50am

Workshop – CE TRACK – Classification & Valuation of Property (1 CE)

Instructed by: Paul Migdal, Esq., Principal, The Greenspan Co./Adjusters International

Ruby Sponsor: The Greenspan Company/Adjusters International

10:50 – 11:00am

Morning Break

Gold Sponsor: Western Security Surplus Insurance Brokers

11:00 – 11:50am

Workshop – PD/SALES TRACK – Social Media/Search Engine Optimization

Instructed by: Topher Grant, Vice President of Sales, Astonish Results

Emerald Sponsor: Astonish Results



Steve Young



Robert Garden



Ron Packer



Paul Migdal



Topher Grant

11:00 – 11:50am

Workshop – CE TRACK– BOP Changes (1 CE)
Instructed by: Angie Heavener, CIC, CPIA,
Principal, Insurance Training Plus
Ruby Sponsor: Insurance Training Plus



Angie Heavener

12:00 – 1:30pm

YBA Awards Luncheon

Emerald Sponsor: Golden Eagle Insurance Corp/
Safeco Insurance

YBA Chair Denny Christner will announce the 2011 recipients of the prestigious Anthony J. DiBudo Award and Harlan Miller Scholarship. Then enjoy “How We Stand” the provocative insights of IBA West President Tim Manaka, Jr, who will overview opportunities and challenges that face young insurance professionals. Followed by our guest speaker, Adam DeGraide, CEO, Astonish Results, who will help you expand your business with an energetic overview of “Insurance Marketing in the Digital Age.”



Adam DeGraide



2:30 – 6:00pm

Workshop - CE TRACK - Winery Risk Management
Walking Tour (3 CE)

Ruby Sponsor: Atlas General Insurance Services

Instructed by: Angie Heavener, CIC, CPIA,
Principal, Insurance Training Plus
Class will do a walking tour of the Reynolds Family Winery.

6:00 – 9:00pm

Dinner & Winery Event at the Reynolds Family Winery
Emerald Sponsor: MJ Hall & Company, Inc

You are in for a special treat! Join the group for wine tasting, winery tour and dinner at the Reynolds Family Winery. Surrounded by beautiful vineyards growing 8 varieties, this Tuscan style winery is the perfect setting to wrap up our event in Napa Valley. Visit their website at www.reynoldsfamilywinery.com to see what's in store. Thanks Suzie!

Special thank you to all of our sponsors!

We would also like to mention our Silver Sponsors:

Applied Systems, Applied Underwriters, CSE Insurance Group, IIBAB San Gabriel Valley, Insurance Relief, Nautilus Insurance Group and Progressive Insurance



CONTINUING EDUCATION CREDITS

Insurance Skills Center has applied for 16 CE hours in the states of: CA, NV, OR, and WA. Alaska Self Certifies. Most course approvals are pending. If your state is not listed, contact Nicolas Seperas of ISC right away at 415-913-2511, and he'll apply for CE credit with your state's division of insurance.

THANKS TO OUR SPONSORS

Without the generous support of ALL of our sponsors, the YBA Leadership & Sales Conference could not provide such a high quality package of seminars, activities, food & beverage and entertainment for such a low price. So we really appreciate all of our sponsors.

Sponsors listed in this brochure are current as of date of publication. All sponsors will be recognized onsite in the conference program and on signage.

Sponsor Levels:

- Grand Conference Sponsor (\$20,000+)
- Platinum Sponsor (\$15,000 – \$19,999)
- Diamond Sponsor (\$10,000 – \$14,999)
- Emerald Sponsor (\$5,000 – \$9,999)
- Ruby Sponsor (\$3,000 – \$4,999)
- Gold Sponsor (\$1,000 – \$2,999)
- Silver Sponsor (\$500 – \$999)

For more information on becoming one of our valued sponsors, call Denny Christner, YBA Chair at 510-523-3435, email – denny@bayrisk.com; or call Joe Hamilton, YBA Vice Chair at 619-443-9181, email – jhamilton@pacbell.net

GOLF INFORMATION

Due to the restructuring of the Leadership & Sales Conference, we will not be holding a golf tournament this year. There are several golf courses not far from the Marriott Napa Valley Hotel. Below are a couple suggestions. Please feel free to book tee times on your own.

Eagle Vines Vineyards & Golf Club

580 S. Kelly Road
Napa, CA 94558
707-257-4470
www.eaglevinesgolfclub.com

Chardonnay Golf Club

2555 Jameson Canyon Road
Napa Valley, CA
707-257-1900
www.chardonnaygolfclub.com

Registration Fees

	Member	Non-Member
Broker/Agent /Sponsor*/Other Attendee**	\$349	\$499 (*See below)
First-Time Broker/Agent Attendee (Retail)	\$349	\$349
Spouse/Domestic Partner/Significant Other/ Dependents 13 & up	\$175	\$175
Child (age 4 -12)	\$ 50	\$ 50

NOTE: Spouses are welcome at all activities including food functions and entertainment. Children under 12 are welcome at all activities including food functions except the Friday Night Napa Valley Wine Train Main Cars. A special train car has been reserved for the kids with babysitters. Children must be 4 or older and potty trained for the train.

CONFERENCE AND HOTEL INFORMATION

HOW TO REGISTER

Go to www.ybac.net and click on the registration button. For information call Member Services at 800-772-8998.

* Sponsors Please Note: Number of attendees you can send is based on your sponsorship level. Please see the sponsor prospectus for guidelines or contact IBA West at 800-772-8998 or www.ybac.net.

** Guests that do not fall under the categories listed above must register as a full registrant.

REGISTRATION AND REFUND POLICY

- Substitutes are welcome, but please notify us in writing five days prior to the Conference.
- Cancellations received in writing prior to May 12 are entitled to a full refund; between May 13 and May 26, a 50% refund; no refunds after May 26.
- In accordance with Title III of the Americans with Disabilities Act, please advise us if you have a disability and are in need of special accommodations for that disability. Please submit your request in writing as early as possible.



HOTEL/LODGING

IBA West has negotiated an outstanding rate of \$149, single or double occupancy.

Don't forget to mention “IBA West” to receive the discounted rate. Please make your reservations by May 19. Reservations made after this date will be accepted on a space availability basis only. ROOMS FILL UP FAST SO CALL TODAY – Call The Marriott Napa Valley Reservations at 707-253-8600 or 800-228-9290 or book your room reservations online through the www.ybac.net webpage.

Check-in time is 4:00 p.m. and checkout time is 12:00 p.m. All guests arriving before 4:00 p.m. will be accommodated as rooms become available. Early check-in or late checkout arrangements are to be made directly with the front desk upon arrival. All requests will be honored on an individual and space available basis.

Should your plans change at the last minute, reservations must be cancelled 24 hours in advance of your reservation or you will be charged your 1st night's deposit. Individuals will be responsible for any no-show fees.



Marriott Napa Valley Hotel & Spa

3425 Solano Avenue
Napa, CA 94558
707-253-8600

Guest Fax: 707-258-1320

Website: www.napavalleymarriott.com

GETTING TO THE MARRIOTT NAPA VALLEY HOTEL & SPA

Conveniently located in the heart of California's renowned Napa Wine Country, the Napa Valley Marriott Hotel & Spa offers the perfect setting. Situated just off Highway 29, our Napa CA hotel is accessible to the full range of local attractions and three major airports. Visit www.ybac.net for directions and rental car information.

DRESS The recommended conference attire is casual wear – shorts, shirts and shoes. All events are casual except The Wine Train on Friday night, where we ask that you dress reminiscent of the Wild Wild West.

FOR MORE INFORMATION

Call the IBA West Service Center at 800-772-8998 or visit our web site at www.ybac.net

