

November 1, 2024



9:30 am REGISTRATION OPENS

10:00 am – 10:50 am

Impact of a Community Foundation: Philanthropic Opportunities for your Clients

OID CE # 6000178391 (1 hour General CE Credit)

Julie Dais, CAP

Director of Gift Planning, Oklahoma City Community Foundation

11:00 am – 11:50 am

Market Update & Forecast for 2025

Christopher Siegel, CEPA

Regional Vice President | Business Consultant

John Hancock Investment Management

12:00 pm– 12:30 pm

Working Lunch (included) from Earls' Rib Palace

State of NAIFA–Oklahoma | Installation of Officers

Shelly Burroughs, LUTCF

NAIFA–Oklahoma President

12:30 pm–1:00 pm

Rep. Chris Sneed

Chair of House Insurance Committee

Oklahoma House District 14

1:00 pm – 2:00 pm

Oklahoma Captive Insurance Act

OID CE # 6000151336 (1 hour General CE credit)

Steve Kinion, ACI

Director | OID Captive Division

2:00 pm

Adjournment

2024

NAIFA–Oklahoma Annual Conference

Location:

Oklahoma City Community Foundation

1000 N. Broadway

Oklahoma City, OK 73102

IMPORTANT PARKING INFORMATION

Please park ONLY in the lot on the East side of the Alley (a highlighted street view will be sent to you prior to the meeting)

If necessary, there is overflow on-street parking on 10th Street

Cost: to Attend:

\$25–NAIFA Members

\$50–Non-Member Guests

There is a \$5.00 processing charge for cancellations and NO REFUNDS after October 28, 2024.

To register online, click on the Register box below this image.

For more information, contact

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Mail checks payable to

NAIFA–Oklahoma

% Mary Garza

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