

INSURCON

Schedule-at-a-Glance

June 15
MON

11 a.m. - 5:30 p.m. IIAT Registration
12 - 1:30 p.m. Luncheon [Invite Only]
1:30 - 4:30 p.m. Volunteer Leadership Symposium
5 - 7 p.m. Welcome Reception
All 3 Days IMPACT Silent Auction

2nd FLOOR
BALLROOM AB
BALLROOM CF
PAVILION

June 16
TUES

7:30 a.m. - 4:30 p.m. IIAT Registration
7:30 - 9:30 a.m. Breakfast
9 a.m. - 1 p.m. Break Service
8:45 - 9:45 a.m. Concurrent Sessions
10 - 11 a.m. Concurrent Sessions
11:15 a.m. - 12:15 p.m. Concurrent Sessions
12:15 - 1:30 p.m. Industry Excellence Lunch & Awards
1 - 5 p.m. Break Service
1:30 - 4:30 p.m. Trade Show
6 - 9 p.m. INSURCON Celebration!

2nd FLOOR
GRAND G FOYER
GRAND G FOYER
GRAND A-F
GRAND A-F
GRAND A-F
GRAND GHI
GRAND G FOYER
GRAND J-S
GRAND GHI

June 17
WED

7 - 8 a.m. Breakfast for Golfers
7:30 - 9:45 a.m. Breakfast
7:50 a.m. - 1:30 p.m. Golf Day: The Chairman's Cup
1:30 - 3 p.m. Chairman's Cup Awards Luncheon
9:30 - 11 a.m. Roundtables

GOLF PAVILION
GRAND G FOYER
TPC OAKS COURSE
GRAND G
GRAND EF

Full
Schedule
continued
on next page



June 15
MON



8 a.m. - 4 p.m.
GRAND G FOYER



All-Day Break Service

PreFix™

FOREMOST
A Farmers Insurance® Company

11 a.m. - 5:30 p.m.
**LOCATED ON
THE 2ND FLOOR**

IIAT Registration

IIAT
ADVANTAGE
E&O • MARKETS • BUSINESS PARTNERS

Swiss Re
Corporate Solutions

Noon - 1:30 p.m.
BALLROOM AB



Luncheon (Invite Only)

Leavitt Group

1:30 - 4:30 p.m.
BALLROOM CF

Volunteer Leadership Symposium

IIAT members, volunteer leaders, and IMPACT donors are invited to join this focused, hands-on advocacy session led by IIAT and Marquez Public Affairs. We'll tackle key legislative issues, explore best- and worst-case outcomes for the industry, and learn practical ways to connect with lawmakers and staff. Working groups will help shape IIAT's advocacy priorities, member resources, and IMPACT engagement strategy.

BroadStreet
— Partners —

IRON
INSURANCE
PARTNERS

5 - 7 p.m.
PAVILION



Welcome Reception @ The Pavilion

Mix, mingle, and kick off the conference with heavy appetizers, drinks, a live DJ, Kona Ice, and outdoor games including table tennis, horseshoes, and Giant Jenga.

Service
Insurance Companies

**ALL 3 Days
of INSURCON**



IMPACT Silent Auction

Bid on items throughout INSURCON. All proceeds benefit IMPACT and IIAT's legislative efforts.



June 16
TUES

7:30 a.m. - 4:30 p.m.
**LOCATED ON
THE 2ND FLOOR**

IIAT Registration



7:30 - 9:30 a.m.
GRAND G FOYER


Breakfast



9 a.m. - 1 p.m.
GRAND G FOYER


AM Break Service



Tuesday >>
continued on
next page

Protect What You've Built.

M★ke an iMPACT

Join fellow IIAT members in supporting the future of independent agents in Texas.

Make a contribution to IMPACT today!



June 16
TUES

8:45 - 9:45 a.m. Concurrent Sessions

Mind the Gap

■ SALES

BALLROOM EF

Anything out of balance can be dangerous, right? During this session, Brandon helps bridge the gap and bring balance between maintaining healthy relationships and leveraging technology. Brandon shares how his team builds deeper, more meaningful relationships and converts over 6,500 digital leads per year. His primary goal is that attendees leave this session with a proven game plan that supports the use of technology, maintains excellent customer experience, consistently generates a positive ROI, and helps build longer-lasting relationships.



Brandon Smith

EVP of Marketing & Communications, Glidewell

Sponsored By



Nationwide®
is on your side

Outsmart the Busywork: Practical AI Moves for Insurance Agents

■ OPERATIONS

GRAND C

Ready to do more with less hassle? This fast-paced session will show insurance agents how to use AI to cut through busywork, speed up routine tasks, improve client communication, and work smarter every day. You'll see practical examples, useful prompts, and fresh ideas for using tools like ChatGPT beyond basic writing tasks, with takeaways you can put to work immediately.



Matt Smith

Director of Growth & MarComms Operations, IIAT

Sponsored By



June 16
TUES

8:45 - 9:45 a.m. Concurrent Sessions

The Best Policy You'll Ever Buy: Invest in IMPACT

■ **ADVOCACY**

BALLROOM AB

Learn why IMPACT is one of the most important tools independent agents have to support IIAT's advocacy work and help ensure your voice is represented when policy conversations begin.



Enrique Marquez

Principal, Marquez Public Affairs



Mitch Carney

Political Director for Dustin Burrows, Speaker of the Texas House of Representatives

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TRAVELERS 

Ethical Management: Breaking Barriers to Integrity

[1 CE Hour]

■ **ETHICS**

GRAND D

Your agency's reputation is your most valuable asset—and your greatest vulnerability. This session breaks down barriers to integrity by providing a practical, repeatable three-question framework to confidently navigate the toughest dilemmas. Invest an hour to secure your agency's future, turn ethical leadership into your long-term competitive advantage.



Tai Jenkins Williams

M.Ed, MS, ITP, MCCT, CLDP

Senior Customer Engagement Training Consultant, Texas Mutual

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Tuesday
continued on
next page



June 16
TUES

10 – 11 a.m. Concurrent Sessions

Hook'Em: The Secret to Client Retention

■ SALES

BALLROOM EF

In a world where sales and lead generation get most of the spotlight, client retention is too often overlooked. In this engaging session, Brandon shares how shifting that mindset transformed his business. By creating a dedicated retention specialist role, his team saw a major boost in client loyalty and cross-selling success. This session will equip you with practical tools to create a more balanced approach...one that values both winning new clients and keeping the ones you already have.



Brandon Smith

EVP of Marketing & Communications, Glidewell

Sponsored By

Root
Insurance

Agency Perpetuation Is a Mindset, Not a Moment

■ OPERATIONS

GRAND C

Perpetuation isn't something you plan for at the end of your career. It's something you build over time. This session explores how to develop a long-term mindset, invest in future leaders, and build an agency that is prepared for transition at any stage.



Kevin Callister

Chief Affiliations Officer, Leavitt Group



Jake Jensen

Executive Vice President of Affiliations, Leavitt Group

Sponsored By

 **Leavitt Group**

June 16
TUES

10 - 11 a.m. Concurrent Sessions

How A Bill Becomes Your Law: Understanding the Process and the Issues

■ **ADVOCACY**

BALLROOM AB

Get a practical look at how ideas move through the Texas Legislature, where agents can make a difference and which issues could affect the insurance marketplace.

Marquez Public Affairs

Sponsored By



Building the Next Generation: From Classroom to Career in Insurance

■ **OPERATIONS**

GRAND D

Finding and developing talent is a major challenge for the insurance industry. This session explores how the CISR High School Program connects classroom learning to career pathways by introducing students to insurance concepts, industry-recognized credentials and real-world work experiences.



Noelle Codispoti

Head of The Academy & Director of Emerging Talent Programs, Risk & Insurance Education Alliance



Dale Randol

President and Chief Executive Officer, IBC Insurance Agency

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RISK & INSURANCE
EDUCATION ALLIANCE

Tuesday >>
continued on
next page

June 16
TUES

11:15 a.m. - 12:15 p.m.
Concurrent Sessions

10X Your Book of Business

■ SALES

BALLROOM EF

In this sales-focused session, IIAT President & Executive Director Marit Peters will show you how to take a fresh look at your book of business, identify your highest-impact clients and opportunities, and focus your time where it can create the biggest return. Inspired by the concepts in 10X Is Easier Than 2X, this session will help agents and producers rethink growth, double down on the top 20% that drives real results, and build a more intentional path to bigger, better business.



Marit Peters

President & Executive Director,
IIAT

Sponsored By

BroadStreet
— Partners —

The Strategic Agency: Turning Data into Better Decisions [1 CE Hour]

■ OPERATIONS

GRAND C

A practical course on using agency data to make smarter decisions that strengthen client retention, improve performance, and drive sustainable growth.



Angela Ford

Continuous Improvement
Director, IIAT

Sponsored By



June 16
TUES

11:15 a.m. - 12:15 p.m. Concurrent Sessions

Big State, Big Stakes: Independent Agents in the Legislature

■ **ADVOCACY**

BALLROOM AB

Explore what is at stake for independent agents in Texas and how IIAT is working to protect the value and influence of the independent agency system.



Robert Howden

Legislative Director
for Gov. Greg Abbott



Brandy Marquez

Principal, Marquez Public Affairs

More panel guests to be announced.

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Ethical Management: Breaking Barriers to Integrity

[1 CE Hour]

■ **ETHICS**

GRAND D

In today's volatile market, your agency's reputation is your most valuable asset—and your greatest vulnerability. This high-impact session is designed for leaders ready to break down barriers to integrity by providing a practical, repeatable three-question framework to confidently navigate the toughest dilemmas. Invest an hour to secure your agency's future, turn ethical leadership into your long-term competitive advantage.



Tai Jenkins Williams

M.Ed, MS, ITP, MCCT, CLDP

Senior Customer Engagement
Training Consultant, Texas
Mutual

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Tuesday
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June 16
TUES



12:15 - 1:30 p.m.
GRAND GHI



Industry Excellence Lunch & Awards

Annual Awards & Business Meeting



Amanda Crawford
Texas Insurance Commissioner



1 - 5 p.m.
GRAND G FOYER



PM Break Service



1:30 - 4:30 a.m.
GRAND J-S



Trade Show

Visit with 130 vendors.

Fully registered agents, place your ticket in the GOLD TUMBLER to enter to win up to \$1,500 during the show.



SCAN TO VIEW
EXHIBITORS

FOOD & DRINKSS
PONSORED BY



GRAND PRIZE DRAWINGS
SPONSORED BY

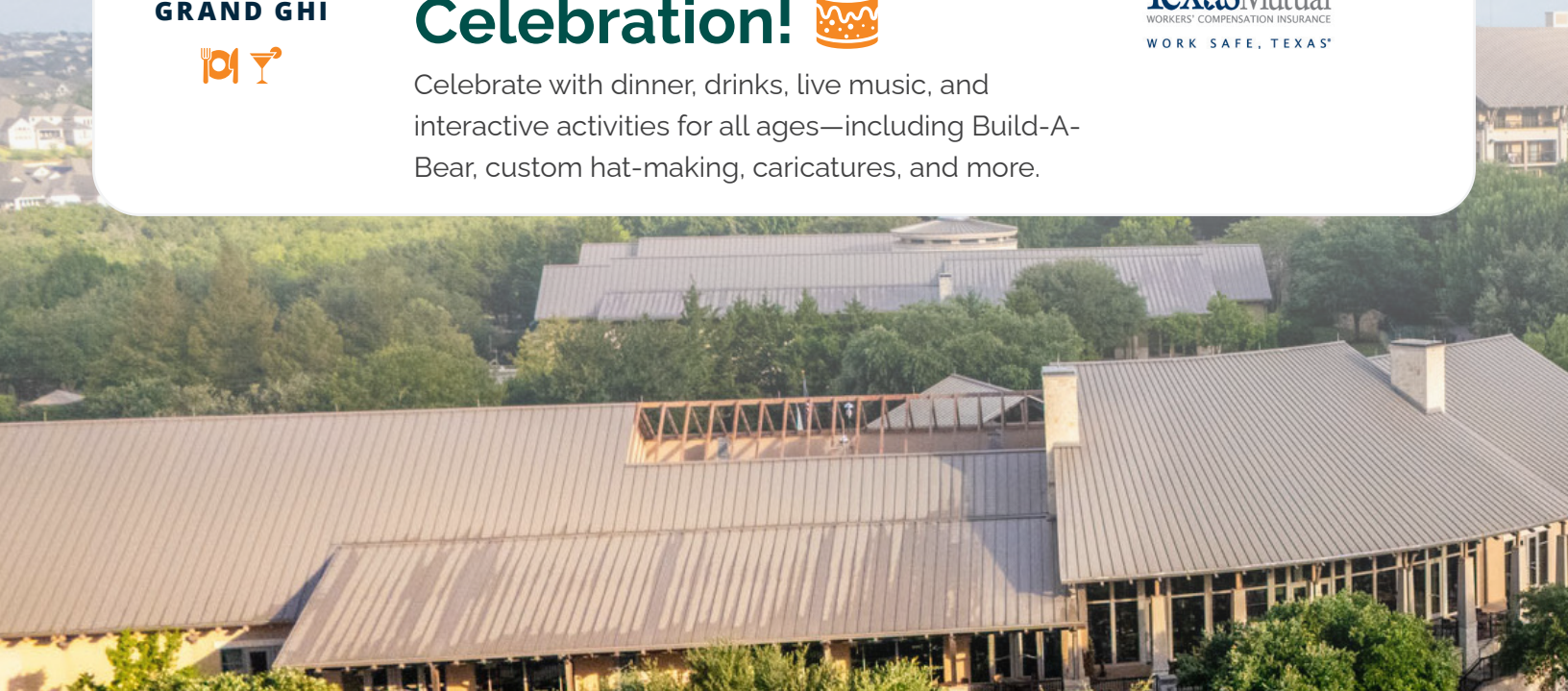


6 - 9 p.m.
GRAND GHI



INSURCON Celebration!

Celebrate with dinner, drinks, live music, and interactive activities for all ages—including Build-A-Bear, custom hat-making, caricatures, and more.





June 17
WED

7:30 - 9:45 a.m.
GRAND G FOYER



Breakfast



7 - 8 a.m.
GOLF PAVILION



GOLF DAY Breakfast for Golfers



7:50 a.m. - 1:30 p.m.

TPC
SAN ANTONIO
OAKS COURSE



SCAN TO VIEW THE GOLF
SCHEDULE & MAP

GOLF DAY The Chairman's Cup

Shotgun start at 8 a.m.

- 4 Person Scramble Format
- On-Course Contests & Prizes
- Every golfer gets a custom rope hat—
because style matters on the course too.



BLOODY MARY BAR
SPONSORED BY



1:30 - 3 p.m.
GRAND G



The Chairman's Cup Awards Luncheon



9:30 - 11 a.m.
GRAND EF

Roundtables

SPONSORED BY



EXCELLENCE IS OUR POLICY.™



Formerly Iroquois®



POWERED BY BIG "I" STATES

COMPLETE THE SURVEY SEE THE RESULTS

”

I'M VERY HAPPY THAT I
COMPLETED THE
COMPENSATION
SURVEY. THE RESULTS
DASHBOARD IS
GENUINELY GREAT
STUFF. IT ALONE IS
NEARLY WORTH THIS
YEAR'S DUES BY ITSELF.

NEW MEMBER BENEFIT

Access the Agency Compensation 360 Dashboard!

The Agency Compensation 360 Dashboard is now live, and it's **FREE for IIAT members.**

Get powerful insights into agency compensation, benefits, and staffing trends from your state and across the U.S.

**To access the dashboard,
Complete the Agency Compensation 360 Survey**



Free for members

Exclusive, interactive data dashboard

See how your agency compares regionally and nationally

Start the Survey • Access Your Dashboard

Go to catalyit.com/comp360/IIAT



%





IIAT Agency Consulting **MAXIMIZE** **YOUR AGENCY**

Feeling Stretched Thin?

We're here to help you tackle the tough stuff.

We get it—you wear a lot of hats. One moment you're leading your team, the next you're managing HR, accounting, sales, and strategy. And on top of it all, you keep the day-to-day operations running smoothly.

That's where we come in.

Let Us Be Your Strategic Business Partner



Strategic
Planning



Customized
Consulting



Kolbe
Strengths



Agency
Technology
Consulting



Agency
Operational
Review



E&O
Website
Review



Meet IIAT's Consulting Team

[L-R] Marit Peters, Carie Roach,
Kier Lewis, and Angela Ford.

Ready to Connect? 

Schedule a
20-minute call.



iiat.org/Consulting

We Value



Continuous Improvement



Service Excellence



Integrity



Relationships



IIAT Leadership



Marit Peters
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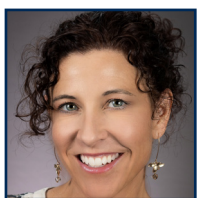


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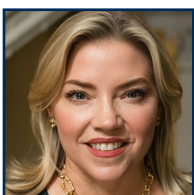
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Enrique Marquez
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2026 - 2027 **IIAT OFFICERS**

OUTGOING CHAIR



**Travis
McDavid**

GSM Insurors
Rockport

Travis McDavid is the Vice President of GSM Insurors in Rockport. He joined his family's agency after graduating from the University of Texas in 2000.

Travis served on IIAT's Board of Directors from 2014 to 2018 and has been the Vice Chair of IIAT's Services Board from 2018 to 2023 and again this past year. Travis returned to the IIAT Board of Directors in 2023.

He has chaired IIAT's Windstorm Task Force since 2013. Additionally, he has been a member of TWIA's Advisory Board since 2016 and currently serves as its chair. Travis is also an IMPACT Region Vice President. He has served previously on the CIC Board of Directors and currently serves on The Academy Board of Directors for the Risk & Insurance Education Alliance (formerly the National Alliance). He serves on the board of the Insurors Group LLC and chaired that board for numerous years. Over the years, Travis has served on numerous company advisory boards.

CHAIR



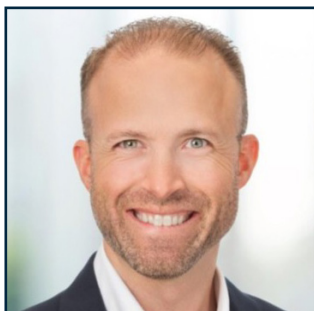
**Tyler
Spears**

BKCW
Austin

Tyler Spears joined BKCW Insurance in 2009 after graduating from The University of Texas McCombs School of Business. Under his leadership as BKCW's Managing Partner, Tyler has expanded the agency's footprint throughout central Texas with locations in Austin, Killeen, Temple, and Brownwood.

Tyler and his wife, Meredith, have two kids and live in Austin. He serves on various regional and national agent councils for Nationwide, Texas Mutual, and Liberty Mutual/Safeco. He was named the 2017 IIAT Young Agent of the Year and sits on the boards of the Independent Insurance Agents of Texas and the Independent Insurance Agents of Austin. Outside of work, Tyler enjoys playing golf and going outdoors, especially to the mountains in the winter and summer.

CHAIR-ELECT



**Kyle
Dean**

Dean & Draper
Houston

Kyle Dean is the President & CEO of Dean & Draper, a full-service independent insurance brokerage founded by his father more than 45 years ago. Since joining the firm in 2005, Kyle has helped grow it from a local operation into a trusted national brokerage, guided by a commitment to integrity, accountability, and innovation.

After his father's sudden passing in 2013, Kyle stepped into leadership with a clear vision: to expand the firm while staying true to its founding philosophy—work hard, play hard, and treat each other like family. Today, that same spirit drives a culture built on teamwork and the flexibility to meet clients' evolving needs.

Born and raised in Houston, Kyle continues to live in the Bayou City with his wife, Kristen, and their two children. The family can usually be found on the go navigating a busy sports schedule that includes baseball, basketball, soccer, and football.

VICE-CHAIR



**Mark
Perkins** CIC, CRM

Perkins Insurance,
a Marsh & McLennan Agency
Abilene

Mark Perkins is the Vice President of Business Insurance and Growth Leader for Perkins Insurance, a Marsh & McLennan Agency in Abilene. He began working with Perkins Insurance Agencies in 2002 and continued leading the agency until its sale to Marsh in May 2024.

A longtime advocate for the independent agency system, Mark has been actively involved with IIAT throughout his career, serving in various advisory and leadership capacities and as a member of the IIAT Board of Directors for several years. He also served as president of SBMP, Inc. from 2017–2019.

Mark and his wife have three children, ages 21, 19 and 11. Outside of work, he enjoys traveling and playing golf, where he describes himself as an avid yet very average golfer.

INSURCON

IIAT Events

Save the Date

Connect with peers and insurance industry service providers at IIAT's annual events. Each year, some of the top experts in the industry speak at our events.



Joe Vincent Management Seminar

INSURCON

January 31-February 2, 2027
Renaissance Austin Hotel

June 28-30, 2027
JW Marriott San Antonio Hill Country

TAKEAWAYS & NOTES



INDEPENDENT



INSURCON



TEXAS STRONG

TexasMutual[®]
WORKERS' COMPENSATION INSURANCE
WORK SAFE, TEXAS[®]

BroadStreet
— Partners —

CATALYT

CAA
Combined Agents of America



INSURICA

IG
INSURORS GROUP

IRON
INSURANCE
PARTNERS

Liberty Mutual
INSURANCE

Leavitt Group

PreFix[™]

QuoteWell[™]
Human-first. Always Advanced.

RISK & INSURANCE
EDUCATION ALLIANCE

SALT

Service
Insurance Companies

Swiss Re
Corporate Solutions

TRAVELERS

IIAT ADVANTAGE
HELPING MEMBERS SUCCEED
E&O • MARKETS • BUSINESS PARTNERS



Thank you to our
Lead Underwriters



Independent Insurance
Agents of Texas

MEMBERSHIP MAKES YOU STRONGER