



# Executive Round Table Conference

by WFG National  
Title Insurance Company



## Executive Round Table Conference Agenda

**Santa Fe, New Mexico | February 3 - 6, 2019**

### Event Activities & Schedule

#### SUNDAY FEB. 3RD

Registration Open 1pm - 9pm: Main lobby

Super Bowl Tailgate Party 3pm - 10pm: Cava Lounge

Hospitality Suite Opens 10pm - 12am 5th Floor Presidential Suite

#### MONDAY FEB. 4TH

Free Time to Explore Santa Fe! 6am - 1:30pm

Registration Open 1pm - 5pm: Main Lobby

Visit with Event Sponsors 1pm - 2pm: Anasazi

Education Sessions Begin 2pm - 6pm: Eldorado Ballroom

Reception, Dinner 6pm - 9pm: Casa Espana

Hospitality Suite Opens 10pm - 12am 5th Floor Presidential Suite



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### Event Activities & Schedule

#### TUESDAY FEB. 5TH

Breakfast 6am - 9am: Old House Restaurant

WFG Information Table 8am - 5pm: Pre-Function Space

General Session Begins 9am - 4:45pm: Eldorado Ballroom

Reception & Dinner 6:30pm - 9:30pm: Gerald Peters Gallery

Hospitality Suite Opens 10pm - 12am: 5th Floor Presidential Suite

#### WEDNESDAY FEB. 6TH

Breakfast 6am - 9am Old House Restaurant

WFG Information Table 8am - 5pm: Pre-Function Space

General Session Begins 9am - 11:15am: Eldorado Ballroom





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### Educational Classes Approved for Credit

#### MONDAY, FEB. 4TH

Economic Considerations: *1 hour TX TDI*

Future of the Industry: *1 hour TX TDI, 1 hour TX Bar*

#### TUESDAY, FEB. 5TH

Compliance Panel Discussion: *1 hour TX TDI, 1 hour TX Bar, 1 hour New Mexico CE*

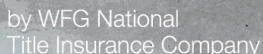
Blockchain Breakout Session: *1 hour TX TDI, 1 hour TX Bar*

HR Finding New Talent: *1 hour TX TDI, 1 hour TX Bar*

HR Panel, Training & Finding New Talent: *1 hour TX TDI, 1 hour TX Bar*

#### WEDNESDAY, FEB. 6TH

Wire Fraud: *1 hour TX TDI, 1 hour TX Bar, 1 hour New Mexico CE*



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# Agenda

## February 4, 2019

**2:00 - 2:30pm Welcome**

**Charles Cain, EVP, Agency Development**

**2:30 - 3:30pm Keynote: Beached Whale - Learning to Swim in a New Ocean**

**Dr. Daren Martin, PHD, Growth Strategist**

### 3:30 - 4:30pm Economic Considerations

**Ray Perryman, President and CEO of the Perryman Group**

## 4:30 - 5:30pm Future of the Industry

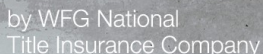
**Patrick Stone, Executive Chairman and Founder of Williston Financial Group**

**Bradley Inman, Founder and Owner of Inman**

## 5:30 - 6:00pm Conclusions

**6:00 - 10:00pm Dinner at Casa Espana**





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# Agenda

## February 5, 2019

**9:00 - 9:15am Welcome**

**Patrick Stone, Executive Chairman & Founder of Williston Financial Group**

## 9:15 - 10:15am Compliance Panel Discussion

**Moderated by: Charles Cain, EVP, Agency Development**

**Panelist: Marx Sterbcow, Managing Attorney, Sterbcow Law Group, LLC**

**Trip Riley, Partner, Saul Ewing Arnstein & Lehr**

**10:15 - 10:30am Break**

**10:30 - 11:30am Breakout Session: Blockchain (Eldorado Ballroom)**

Moderated by: Gorkem Kuterdem, Chief Technology Officer, WEST, a Williston Financial Group Company

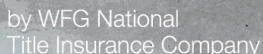
**Panelists: John Levonick, Special Counsel, Pepper Hamilton, LLP**

**John Heck, Chief Business Officer Strategist**

**10:30 - 11:30am Breakout Session: Sales and Marketing (Zia)**

**Justin Tucker, Chief Marketing Officer, WEST, a Williston Financial Group Company**

**11:30 - 1:00pm Lunch (Anasazi)**



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# Agenda

## February 5, 2019

**1:00 - 2:00pm Breakout Session: RON (Eldorado Ballroom)**

Moderated by: Mickey Vandenberg

**Brianne Woltmann, Executive Vice President | Escrow Officer, Providence Title**

**Jaime Kosofsky, Founding Partner, Brady & Kosofsky**

**1:00 - 2:00pm Breakout Session: Sales & Marketing – The Social Impact (Zia)**

**Justin Stutz, VP Strategic Growth, WEST, a Williston Financial Group Company**

**2:00 - 2:30pm Break**

## 2:30 - 3:30pm HR: Finding New Talent

Moderated by: Donald O'Neill, Chief Compliance Officer, WFG National Title Insurance Company

**Panelists: Eric Brio, Founding Partner, Anderson | Brio, LLC**

Greg Lyssy, President, Mission Title, LP

### 3:30 - 4:30pm HR Panel: Training & Retaining Talent

**Moderated by: Theresa Williamson, SVP, Compliance & National Training Manager, WFC National Title Insurance Company**

**Panelists: Jim Pender, Owner | President, First National Title Company**

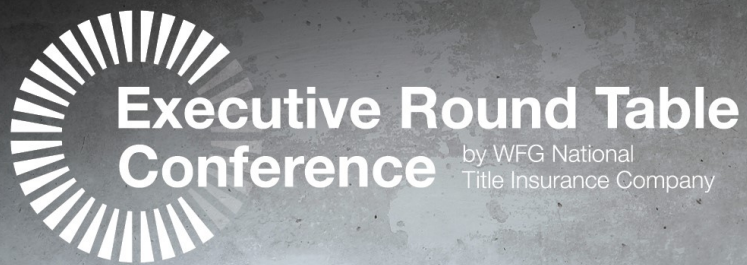
**Jonathon Holfinger, Esq. , Founder & Partner, The Holfinger Stevenson Law Firm**

## 4:30 - 4:45pm Wrap Up & Conclusions

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### **Agenda February 6, 2019**

#### **9:00 - 10:00am Wire Fraud**

Bruce Phillips, SVP, Chief Information Security Officer, WEST, a Williston Financial Group Company  
Tom Cronkight, Co-Founder & CEO, CertifID | Co-Owner, Sun Title

#### **10:00 - 11:00am Special Insurance**

Alan Fields, SVP Director of Underwriting Services, WFG National Title Insurance Company  
Phil Oldcorn,  
Julio Bermudez, Partner, Thompson Flanagan's Executive Liability Group, LLC

#### **11:00 - 11:15am Wrap Up - Thank you!**