

IPA PUBLIC POLICY SUMMIT AGENDA

January 24-25, 2022

January 24

6:00PM – 7:00PM Reception

7:00PM – 9:00PM Dinner

January 25

7:00 AM – 8:00AM Welcome Breakfast

8:00AM – 9:00AM Industry, Political & Regulatory Updates

- Industry Changes & Trends
- Political and Legislative Update
- Federal and State Regulatory Review (SEC, DOL, FINRA, NASAA/States)

9:00AM – 12:00PM Strategy Discussions & Group Breakouts
Industry & IPA Strengths, Weaknesses, Opportunities, Threats

12:00PM – 1:00PM Lunch Break

1:00PM – 2:45PM Develop & Prioritize Strategy Session Feedback

2:45PM – 3:00PM Break

3:00PM – 3:30PM Finalize IPA 2022 Priorities & Critical Issues List

3:30PM End