

Monday, July 27

6:30 pm - 8:30 pm Rock & Soul Museum with Memphis Style Dinner

Tuesday, July 28

7:30 am - 12:00 pm Open for networking in vendor lounge; exploring on your own

8:30 am - 11:30 am Shareholder Services 101 (advance registration requested)

11:45 am - 1:15 pm First Time Attendee Lunch with SSA Board Members (invite only)

1:30 pm - 2:00 pm Networking and Exhibits

2:00 pm - 2:15 pm Welcome and State of the SSA with President, Kim Hanlon

2:15 pm - 3:15 pm **Becoming Aware of and Mitigating Hidden Costs**

Uncovering hidden costs in shareholder servicing and corporate actions: Strategies for using internal and external partners to reduce costs while maintaining quality service.

3:15 pm - 3:45 pm **Networking Break and Exhibits**

3:45 pm - 4:45 pm **Shareholder Technology - Bridging the Tech Gap**

Attracting the next generation of investors with on-the-go tools and apps while balancing the needs of the more seasoned shareholders; being aware of potential risks associated with the use of new technology.

6:15 pm - 9:30 pm Welcome Reception & Networking Dinner at Elvis Presley Automobile Museum

Wednesday, July 29

8:00 am - 9:00 am **Networking Breakfast**

9:00 am - 10:00 am **Legal and Regulatory Updates**

Updates, changes, impacts and requirements of regulatory bodies that govern the shareholder services industry.

10:00 am - 11:00 am **Unclaimed Property Updates**

Update on changes and impacts including the AT&T case.

11:00 am - 11:30 am **Networking Break and Exhibits**

11:30 am - 12:30 pm	Communication Strategy What tools can we bring to our role to be better communicators? Panel will discuss strategies on how to deal with irate shareholders and building a communication plan to present good and/or bad news to shareholders.
12:30 pm - 1:45 pm	Networking Lunch and Exhibits
1:45 pm - 4:00 pm	Open Forum on Roles and Responsibilities of Issuer and Agent (Theatre) Submit your questions prior to the conference! We will also cover what tasks fall within the issuer responsibility v. the transfer agent's responsibility - such as but not limited to, different audits, daily challenges, records retention, due diligence / unclaimed reporting and control of certain processes such as monitoring insider trading.
4:00 pm - 5:30 pm	Movie and Popcorn - Optional moving viewing exclusively for SSA Members Open for Vendor Night

Thursday, July 30

8:00 am - 9:00 am	Networking Breakfast and Exhibits
9:00 am - 10:30 am	Unclaimed Property - State Panel
10:30 am - 10:45 am	Power Break
10:45 am - 11:45 am	Annual Meeting Best Practices Session includes topics covering Proxy Reform, Strategies to obtain vote, Potential changes to discretionary and proportional voting, Engaging retail holders, etc.
11:45 am - 12:45 pm	Industry Hot Topics Covering the topics you are hearing about such as California Consumer Privacy Act (CCPA), GDPR and block chain processing but want to learn more.
12:45 pm - 1:00 pm	Conference Wrap-up
