

Wednesday, September 22, 2021 - all times listed in Central Time

10:30 am - 11:00 am	Networking / Coffee Time
11:00 am - 11:15 am	Welcome / State of the SSA
11:15 am - 12:00 pm	Becoming Aware and Mitigating Hidden Costs - Moderated by Andy Wilcox Uncovering hidden costs in shareholder servicing and corporate actions: Strategies for using internal and external partners to reduce costs while maintaining quality service.
12:00 pm - 12:45 pm	Shareholder Technology - Bridging the Tech Gap - Moderated by Bill Kennedy 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.
12:45 pm - 1:00 pm	Break
1:00 pm - 2:00 pm	Networking Event - Join other conference attendees for this fun, interactive event!
2:00 pm - 2:45 pm	Hot Topics - DTCC Update- Moderated by Kevin Burns Updates on dematerialization and T+1
2:45 pm - 3:30 pm	Annual Meeting Best Practices - Moderated by Dorothy Flynn Navigating your annual meeting utilizing best practices.
3:30	Day One Closing Comments

Thursday, September 23, 2021 - all times listed in Central Time

10:30 am - 11:00 pm	Networking / Coffee Time
11:00 am	Welcome to Day Two
11:00 pm - 11:45 pm	Legal and Regulatory Updates - Moderated by Katie Sevcik Updates, changes, impacts and requirements of regulatory bodies that govern the shareholder services industry.
11:45 pm - 12:30 pm	Unclaimed Property Updates - Moderated by Melissa McCarthy Update on Changes and Impacts including the AT&T case.
12:30 pm - 12:45 pm	Break
12:45 pm - 1:45 pm	Networking Event - Join other conference attendees for this fun, interactive event!
1:45 pm - 2:30 pm	Unclaimed Property State Panel - Moderated by Pam Wentz TBD
2:30 pm - 3:30 pm	Open Forum - Moderated by Kim McKiernan Free time to discuss conference topics as well as burning questions. Submit your items in advance.
3:30 pm	Conference Wrap-up