



ARIZONA BIG I *Convention*



MARK CRITES
Speaker



DANIEL METCALF
Speaker



JAKE PLUMMER
Keynote

JW Marriott Desert Ridge, Phoenix

SEPTEMBER 2-3, 2026

INDEPENDENT STRONG. UNITED STRONGER.

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www.iiabaz.com/Convention



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EVENT AGENDA

Wednesday, September 2nd

7:30 AM - Shotgun

Golf Tournament at the Wildfire Golf Club

11:30 AM - 1:30 PM

Golf Wrap-Up at Dave & Buster's Desert Ridge 9 Ball Lounge

6:00 PM

Welcome Gathering at the Twenty6 Lounge

Informal Meet and Greet

Thursday, September 3rd

7:30 AM - 8:00 AM

IIABAZ & SLAAZ Annual Meeting

8:00 AM - 9:00 AM

Awards and Installation Breakfast

Association Awards, Past President Recognition, and Installation of Officers and Board

9:00 AM - 9:10 AM

Arizona DIFI Director Charles "Chuck" Bassett

9:10 AM - 10:00 AM

Forces Shaping the Future of Insurance Distribution

Mark Crites, Regan Consulting

The insurance industry has evolved significantly over the last 15 years.

Years leading up to the global pandemic felt like the Age of Prosperity. Now, are we in the Age of Anxiety?

There are several forces at work in 2026. How will those forces (both old and new) shape the future?

10:00 AM - 11:00 AM

Agency Perpetuation: Back to Fundamentals

Mark Crites, Regan Consulting

What does successful perpetuation look like in 2026? What has changed and how are firms adapting to new economic realities to maintain optionality in today's marketplace?

11:00 AM - 12:00 PM

The AI-Driven Business Playbook

Daniel Metcalf, CyberFin, LLC

A practical framework to go from "we know we need AI" to actual implementation that drives revenue and efficiency.

12:00 PM - 2:00 PM

Convention Luncheon with Keynote Jake Plummer

2:00 PM - 6:30 PM

Trade Show & Exhibit Hall

Free for all Agency and Company Personnel featuring 133 booths with markets, products and services, prizes, entertainment, libations, and networking.

GUEST SPEAKER

MARK CRITES

REAGAN CONSULTING

Mark Crites joined Reagan Consulting in 2017 and is a partner of the firm. Mark primarily works with clients on mergers & acquisitions, agency valuation, and strategic consulting projects.

Prior to joining Reagan, Mark spent two years at a private equity firm acquiring middle market companies in the business services, media & telecom, specialty distribution, manufacturing, and healthcare sectors. He was responsible for leading valuation exercises and executing due diligence processes. He also worked closely with management teams on strategic planning and value creation initiatives.

Mark began his career in investment banking focusing on sell-side M&A and capital raising transactions for middle market companies.

He is a Certified Valuation Analyst and a graduate of the University of Georgia Terry College of Business, where he received his B.B.A. in Finance and Risk Management & Insurance and currently maintains the Series 63, 79 and 82 FINRA.



GENERAL SESSION

THURSDAY 9AM-11AM
Grand Canyon 1-5

INDEPENDENT INSURANCE
AGENTS AND BROKERS OF ARIZONA



Presentations

FORCES SHAPING THE FUTURE OF INSURANCE DISTRIBUTION

9AM - 10AM

The insurance industry has evolved significantly over the last 15 years. Years leading up to the global pandemic felt like the Age of Prosperity. Now, are we in the Age of Anxiety? There are several forces at work in 2026. How will those new and old forces shape the future?

AGENCY PERPETUATION: BACK TO FUNDAMENTALS

10AM - 11AM

What does successful perpetuation look like in 2026? What has changed and how are firms adapting to new economic realities to maintain optionality in today's marketplace?



GUEST SPEAKER

DANIEL METCALF

CYBERFIN

Daniel Metcalf is a cybersecurity expert, AI evangelist, and serial entrepreneur who's spent the last 15 years helping small and mid-sized businesses stay secure and grow with confidence.

He is also the Co-founder and CEO of CyberFin, delivering Fortune 100-level AI adoption and cybersecurity solutions to Trust Driven Main Street businesses.

Known for his high-energy, no-nonsense style, Daniel makes complex topics like cybersecurity and AI simple, practical, and even fun.

Daniel focuses on making AI accessible, actionable, and relevant to every agency, ensuring that they not only utilize it for efficiency and growth but meet cyber safety and compliance standard.

When he's not helping businesses outsmart cybercriminals or automate with AI, you can probably find him on the curling rink.

GENERAL SESSION

THURSDAY 11AM-12PM
Grand Canyon 1-5

INDEPENDENT INSURANCE
AGENTS AND BROKERS OF ARIZONA



Presentation

THE AI-DRIVEN BUSINESS PLAYBOOK

11AM - 12PM

A practical framework to go from "We know we need AI" to actual implementation that drives revenue and efficiency. Walk away with: Not inspiration — Implementation. A clear understanding of where you're losing time (usually 2-4 hours per person, per day). Real examples of how AI is being used inside agencies today.

Simple workflows that can be implemented immediately. In short: Clarity → Confidence → Action.

Session is tailored with a pre-event check for quick alignment on goals + audience pain points.

Live session is interactive, high-energy, with real workflows and Q&A.

Post-event key takeaways and optional tools/resources keep the momentum going.

Keynote Speaker

JAKE PLUMMER



Jake Plummer's journey from Arizona sports legend to respected philanthropist makes him an exciting addition to the 2026 IIABAZ Convention lineup as keynote. Best known for leading the Arizona State Sun Devils to a historic Rose Bowl season in 1996, Plummer earned a reputation for toughness, leadership, and an unforgettable competitive spirit that made him one of ASU's most beloved athletes.

Plummer carried that success into the NFL, where he starred with both the Arizona Cardinals and Denver Broncos during a ten-year professional career. Known for his resilience and playmaking ability, he led the Cardinals to their first playoff win in decades and later guided the Broncos to multiple postseason appearances, earning admiration from teammates and fans alike.

While his football career was impressive, Plummer's impact off the field has become equally inspiring. Since retiring from the NFL, he has devoted much of his time to charitable causes focused on wellness, community engagement, and healthy living. His involvement in charitable pickleball events and fundraising tournaments has helped bring communities together while supporting important nonprofit initiatives.

Today, Jake Plummer continues to inspire audiences through his authenticity, leadership, and passion for giving back. IIABAZ is proud to welcome a true Arizona icon whose story extends far beyond the football field and whose message of perseverance and purpose will resonate with attendees throughout the convention.



CONVENTION LUNCH

THURSDAY 12PM-2PM
Wildflower Ballroom

INDEPENDENT INSURANCE
AGENTS AND BROKERS OF ARIZONA



TRADE SHOW & EXHIBITORS

Thursday, September 3, 2026: 2pm - 6:30pm

JW Marriott Desert Ridge Resort - 5350 East Marriott Drive, Phoenix

Everyone is welcome to attend this FREE Trade Show at JW Marriott Desert Ridge's Grand Canyon Ballroom featuring 133 Exhibit Booths including markets, products, services, and networking opportunities to boost your business potential along with booth drawing prizes, entertainment, drinks, giveaways, and hourly exclusive prizes. Bring all your co-workers and industry friends.

Exhibitors

Aegis General Insurance
Agave
American Collectors Insurance
American Modern Insurance Group
Amigo Mexico Insurance
AmShield Insurance
AmTrust Financial Services, Inc.
AmWins Access Insurance Services
Applied Underwriters
ASNOA - Agent Support Network of America
Aspire General Insurance
Auto Glass Now
Auto-Owners Insurance
Bass Underwriters
BBSI
Berkley Southwest
Berkshire Hathaway GUARD Insurance Companies
Berkshire Hathaway Homestate Companies
Bluefire Insurance
Bridger Insurance Services
BrightFire
BriteCo
Builders
Burns & Wilcox
Call A Doctor Plus
Canopy Connect Inc.
Capital Insurance Group
Capital Premium Financing
Care West Insurance Company
Colonial General Insurance Agency
Commercial Sector Insurance Brokers
Commonwealth Insurance
Coterie Insurance
CRC Specialty
CRC Tapco
CyberFin, LLC
Diamondback Disaster Services
Distinguished Programs
ePayPolicy
FirstChoice, a Marshberry Company
Foremost Insurance Company
Futuristic Underwriters
GAINSCO Auto Insurance
Glatfelter Insurance
Gorst & Compass Insurance
Great American Insurance
GuideOne Mutual Insurance Company
Hagerty
Hallmark Financial Services, Inc.
HawkSoft
Imperial PFS
Independent Insurance Agents and Brokers of Arizona
InsBOSS
Insurance Accountants
INSURASSIST
InsurBanc
Insurors Indemnity
Ironpeak
Ironwood Brokers
ISC (Integrated Specialty Coverages)
Johnson & Johnson Insurance
Kemper Auto

Kowalski Construction
Lava Automation
LeakSecure
Liberty Mutual Insurance Company
Main Street America
Mendota Insurance, MGA Advantage Auto
Mercury Insurance
Mexico Insurance Online
MexiPass International Insurance Services, LLC
MiniCo Insurance
MX Risk Insurance Services & MacAfee and Edwards, Inc.
National First Response
National General an Allstate Company
National Partners
Neptune Flood
Novo Insurance
One Alliance North America
Orion180 Insurance
Pacific Gateway Insurance Agency
Pacific Specialty Insurance Company
Pennsylvania Lumbermens Mutual Insurance Company
PersonalUmbrella.com
Philadelphia Insurance Company
PIIB - Pacific Interstate Insurance Brokers
Progressive Casualty Insurance
Rainbow
REInsurePro
Reliable Premium Management (RPM)
Renaissance Alliance Insurance Services
Renaissance Benefits
RLI Surety
Root Insurance
RT Specialty
Safeway Insurance Company
SDI Staffing
Shield Commercial Insurance Services
Skyward Specialty Insurance Group
Smart Choice
Southeast Personnel Leasing
Southwest Insurance Agents Alliance
Specialty Program Group LLC
Steadily
Stillwater Insurance Company
Stonegate Insurance
Sun Coast General Insurance Agency, Inc.
The General
Travelers
Trean Insurance Group
Trexis Insurance
Truckers Insurance Associates
UCA General Insurance Services, Inc.
UCPM, LLC
US Assure
Vertafore
WCF Insurance
West Bend Insurance Company
Westfield
WestPac
Wholesure
Young Insurance Professionals
Zenith Insurance Company

CONVENTION REGISTRATION

92nd Convention & Trade Show

JW Marriott Desert Ridge Resort - 5350 E Marriott Drive, Phoenix AZ 85054

One Form Per Person.

Mr./Ms. _____ First Name for Name Badge _____ Last Name _____ Designations _____

IIABAZ Agency Member? ___YES ___NO IIABAZ Associate Member? ___YES ___NO Do you hold a Surplus Lines License? ___YES ___NO SL License #: _____

Email _____

Agency/Company Name _____

Business Address _____ Phone (_____) _____

Registration Fees		IIABAZ Member Agency & Associate	NonMember	AMOUNT
Registration All Events Excluding Golf		\$210.00	\$350.00	
Surplus Lines Meeting Registration 7:30am Meeting & 8am Breakfast Only <i>Surplus Lines License Required & Listed Above</i>		FREE	FREE	
	QTY			
Extra Breakfast Tickets		\$75.00	\$105.00	
General Session Tickets		\$100.00	\$175.00	
Extra Lunch Tickets		\$85.00	\$125.00	
Total Amount Due:				

Free Trade Show!

Exhibit Hall is open to All
Thursday, September 3
2:00pm - 6:30pm

ENTRY TO THE TRADE SHOW IS FREE
NO REGISTRATION REQUIRED

Special meal requests may be accommodated if possible and additional charges may apply. Advance notification required. Email convention@iiabaz.com with requests by August 15th.

Payment Options



Check payable to IIABAZ.



Credit Card: Visa, Mastercard, American Express, or Discover

Credit Card Number _____ Expiration Date _____ Security Code _____

Name as it Appears on Card _____

Credit Card Billing Address _____ City/State/Zip _____

Email Address for Credit Card Receipt _____

How to Register

Online: www.iiabaz.com/Convention

By Email: convention@iiabaz.com

By Fax: (602) 468-1392

By Mail: IIABAZ
333 East Flower Street
Phoenix, Arizona 85012

Questions? Call: (800) 627-3356

Cancellation Policy:

\$25 per person administrative charge assessed by IIABAZ for all cancellations received on or before 8/6/2026.

Cancellations received on or after 8/7/2026 forfeit full registration.

No shows forfeit full registration.

GOLF REGISTRATION

SEPTEMBER 2 | WILDFIRE GOLF CLUB

Wildfire Golf Club's Palmer Course at JW Marriott Desert Ridge Resort
5350 E Marriott Drive, Phoenix Arizona 85054

7:30am Shotgun Start (Scramble)

11:30am-1:30pm Wrap-Up at Dave & Buster's Desert Ridge 9 Ball Lounge

CASH PRIZES
\$15K Hole in One
1st & 2nd Place Foursomes
Longest Drive
Closest to the Pin

First Name _____ Last Name _____

Email _____

Agency/Company Name _____

Business Address _____ (_____) _____
Phone

FOURSOME PREFERENCE

If paying for a foursome or multiple people, please list them below and check **Paying** to indicate you are paying for those players on this registration. If you list individual players you want to team up with but they are not registered and paid by August 17, 2026 you (and your group) will be placed with other individuals to complete a foursome.

1st Golfer Name & Firm Name _____ Paying _____ 2nd Golfer Name & Firm Name _____ Paying _____

3rd Golfer Name & Firm Name _____ Paying _____ 4th Golfer Name & Firm Name _____ Paying _____

Registration Fees	QTY	IIABAZ Member Agency & Associate	NonMember	AMOUNT
Registration Per Person - includes Practice Balls, Cart, and Round of Golf		\$150.00	\$175.00	
Total Amount Due:				

Payment Options

☐ Check payable to IIABAZ. ☐ Credit Card: Visa, Mastercard, American Express, or Discover

Credit Card Number _____ Expiration Date _____ Security Code _____

Name as it Appears on Card _____

Credit Card Billing Address _____ City/State/Zip _____

Email Address for Credit Card Receipt _____



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**JW
MARRIOTT
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PHOENIX**

CONVENTION HOTEL

RESERVATIONS

JW Marriott Phoenix Desert Ridge Resort & Spa

Online: <https://book.passkey.com/go/ArizonaIIABA2026>

Or call (800) 898-4527 and use Group Code **ArizonaIIABA2026** for discounted rate of \$169+\$10 Resort Fee a night for September 2-4, 2026.

Porterage & Housekeeping fees at guest discretion.

First Night Deposit Required.

4pm Check-In, 11am Check-Out

Reservations must be made before August 3, 2026.

21-day prior cancellation required for full refund.

JW Marriott Desert Ridge is a five-star, AAA 4-Diamond luxury resort. Nestled in the serene Sonoran Desert, this Phoenix spa resort offers exceptional amenities - from 17 pickleball courts and a pro shop to the AquaRidge WaterPark with five pools, a lazy river, adult-only island, and private cabana cottages. Golf lovers can enjoy two championship courses with PGA instruction and club fittings. With breathtaking views, personalized service, and world-class experiences this is a desert oasis for relaxation, recreation, and rejuvenation.

Desert Ridge Marketplace & High Street

Set in a striking outdoor setting, Desert Ridge Marketplace features premier shopping, chef-driven restaurants, health and fitness-inspired options and entertainment for all occasions.

From top-rated restaurants to one-of-a-kind salons and boutiques, High Street is the ideal place to meet up with friends, gather with family, or simply escape.

5350 E Marriott Drive
Phoenix, Arizona 85054

480-293-5000

