



2023 Yearbook

**San Antonio, TX
September 11-13, 2023**

Raising a Glass.

This year marks Keystone's 40th anniversary.

It all started with a premise – and a promise. Among a hard market, agents needed added solutions beyond their local reach, and the expertise to coach them through it. Keystone was born.

Devoid of modern technology, creating awareness and buy-in took added efforts. But the commitment was there. And the effects immediately felt. What grew from a handful of agencies under a cooperative quickly grew to a network in multiple states.

Raising the Bar.

Keystone's mission remains the same. Incubate a community of intellectuals and give them access to premier products, solutions, and expertise to help implement them with prosperity. This year's celebration in San Antonio showcased who we are, where we've been, and where we're headed.

In commemoration of 40 years of success, we created a timeline display full of throwback memories highlighting the major events in Keystone's history.



The essence.

Catch up with all three days via our highlights video.



Sunday Highlights

What event is complete without an anniversary celebration?

We headed to the Alamo to raise a glass to our carrier partners – those who help us offer client solutions, and agency growth opportunities, not obtained elsewhere.



Day 1

A Moment to Remember.

On a bright September day in 2001, the United States – and the world – changed. September 11 will forever be forged in our memories not just as a day of tragedy, but of courage. We took a moment of silence to remember those lives lost, and the event's impact on all of us.



Leadership isn't about popularity – it's about potential.

Keynote Kevin Brown (above) encouraged us to never lose the childhood spirit of curiosity and creativity. Through the lens of his autistic son, he asked us to consider how ordinary, everyday heroes profoundly impact others. Aunt Bea – serving those apple pancakes with Mickey Mouse ears at Disneyworld – would be proud.



Economic Impacts.

Today's environment plays a huge role in insurance placement and client satisfaction. Inflation and CAT losses have set a precedent on rates and carrier appetites. How should agents handle this uncertainty? We discuss in this panel with the IIA Oklahoma, Eastern Alliance, SwissRe, EMC, and our very own Tony Rhodes in the P&C Division.

Sara Bradshaw Ray (above)

What's Coming Down the Pipeline for 2024.

Keystone keeps moving and shaking. Our divisions gave a snapshot of new products and services available next year, including agency sales training, new risk management services for clients, and onboarding for agencies.

Mike Reddy (standing), Jeremiah Hale (left), and Tony Rhodes (right)



Where are you finding success?

Our small group roundtables tackled topics like agency production metrics, how ownership can impact operational efficiencies, and how technology can improve competitiveness.

L-R: Steve Lester, Hunter Odom (above)



Passing the Torch.

How do you transition ownership of an agency to future generations, without headaches or animosity? Bill McMahon (above), owner of the McMahon Agency in New Jersey, lends his insights from firsthand experience, and how Keystone has helped his agency grow as new ownership takes flight.

KEYSTONE

Better Together for 40 Years!



Get out the black tie!

Our agencies pour so much lifeblood and soul into their business. Who from our network stands out in exemplifying growth and all things Keystone? Enter in our Agency of the Year awards. We recognized individual winners by state, and awarded an overall national winner. Congrats to Arachas Insurance Group (right) in Illinois for that honor!

This celebration was also bittersweet. Our longstanding Chief Operating Officer, Lea Ann Hawk, is retiring at the end of 2023. We celebrated her achievements and synergy for growth – complete with an MC she may know from her childhood!



Donations to The Autism Society of America emanating from Monday night's gala surpassed \$20k. Joe Joyce matched the contribution bringing the total donation to over \$40k!

Day 2

Networking Event



Showcasing Value.

On day 2, we focused on how agents can impact their operations from a real-world perspective. Keystone divisional representatives and our legal counsel helped attendees tackle how to resolve claims issues, handle remote and hybrid workplace challenges, and marketing differentiators.

L-R: Jim Spencer, Renee Mielnicki, Jennifer Price



How does Cyber Liability impact E&O?

Emma Werth Fekkas (left) with Cyber Liability carrier, Cowbell Cyber, gave an impressive view into how the current market conditions affect E&O, and how those scenarios need to be protected.

A CEO Perspective

Inflation. Rising rates. Catastrophic events. Artificial intelligence. How do all these things play into our industry, and how is Keystone responding?

CEO David Boedker (right), in partnership with Marketing Director Anthony Mitchell, set the tone and pace for future expectations and commitments from Keystone in tackling these challenges.



What event in San Antonio is complete without a BBQ and rodeo? We celebrated the best that Texas has to offer with our agents and carriers! The networking event was well received – fostering conversations that tackle challenges and real-world solutions in an uncertain economic environment - while being duly entertained!



InsurTech Summit

For our third day together, Keystone hosted the BigI InsurTech Summit where we gained valuable insights from leaders in the industry into how technology is shaping the future of insurance.

Key Talk.

Patrick Kinney (right) addresses the question of how the insurance industry can adapt and leverage technology to meet the evolving needs of customers and the modern world.



Experience Keystone... not offer the Keystone experience.

Next up, panelists on the Marketing and Sales panel explored how technology can help individual roles within an agency improve customer service and scale to changing market conditions.

L-R: Moe Latif, Marit Peters, Raution Jaiswol

Strategy is nothing without execution.

The Technology Strategy panel explored how to leverage technology to better understand and underwrite risks – avoiding duplication and making the complex simple.

(Above) Mike McBride



Save the Date

Don't miss these next opportunities to join your community!

Emerging Leaders

Hilton Tampa Downtown

April 22-24, 2024
Tampa, FL



National Conference

Hilton Columbus Downtown

September 15-17, 2024
Columbus, OH

How to Sponsor

More than a network,
we're a community.

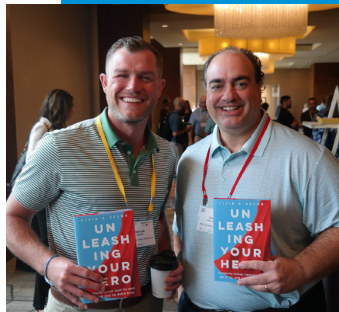
We rely on partnerships with our agents, carriers, and vendors to bring the themes, messages, and talent we showcase at each event.

That's where you come in.

If you are interested in being a sponsor with us, contact the sponsor team at sponsor@keystoneinsgrp.com.

From simple recognition, to graphics, to paving the way for our speakers to educate and empower us, there are sponsor levels for everyone.

With you, independence works better together.



Thank You!

Independence can't
happen alone.

Planning an event that serves both sales producers and owners is a heavy lift. We want to thank the staff and agents who helped make this year's conference happen.

National Conference Team:

Beth Bedisky
David Boedker, II
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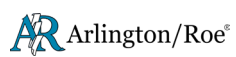
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