

Day 1: June 23, 2026

7:15-8:00

Breakfast

8:00-10:00

Stratus Kickoff

10:00-10:30

Break

10:30-11:45

Stratus Walk-Thru

11:45-1:00

Lunch

12:15-12:55

Credits with AEP

1:00-2:15

Breakout Sessions 1
Allocator/Agent & Efile

2:15-2:45

Break

2:45-4:00

Breakout Sessions 2
Municipal & Provisions

5:00-8:00

Opening Night Celebration

Day 2: June 24, 2026

7:15-8:00

Breakfast

8:00-10:00

Legislative Updates
& Hot Topics

10:00-10:30

Break

10:30-11:45

Life & PC Roundtables

11:45-1:00

Lunch

12:15-12:55

Sales & Use with Paragon

1:00-2:15

Breakout Sessions 3
*Management Module & Advanced
Retaliatory*

2:15-2:45

Break

2:45-4:00

Breakout Sessions 4
*Credits Module &
How to Handle Audits*

5:00-7:30

Hosted Dinners

Day 3: June 25, 2026

7:15-8:00

Breakfast

8:00-10:00

Stratus Walk-Thru

10:00-10:30

Break

10:30-12:00

Stratus Brainstorm &
Conference Wrap-Up

12:00-1:00

Optional Lunch

Session Descriptions

Day 1: Tuesday, June 23, 2026

Stratus Kickoff: *Progress, Priorities, and Vision*

Our conference kickoff will review where we are in our move to Stratus, highlight the key next steps, and share the vision driving our transition to Stratus.

Stratus Walk-Thru

This interactive walk-thru of Stratus will begin with an overview of the platform and lead into core features, planned feature sets, and the day-to-day user experience for Premium Pro and FormsPlus. There will be opportunities for discussion and feedback.

All breakout sessions are moderator lead open discussions and will rely heavily on attendee experiences and participation. Please come prepared to share and learn.

Allocator/Agent

In this session, attendees will explore our Allocator and Agent software. Discussions will focus on the premium allocation process for local taxes, data quality, state requirements, and software features.

Efile

State requirements for electronic filing and payment continue to evolve. This session will cover state-specific requirements, changes, and updates, as well as the nuances with various filing methods.

Municipal

This session is an open discussion about municipal taxes and the Stratus Municipal Pro software. Topics will include municipal tax issues and challenges, state specific requirements, as well as software data flow.

Provisions

Preview our plans for a new provisions module in Stratus directly integrated with Premium Pro, along with an opportunity to provide feedback that will help shape our provisions product design.

Day 2: Wednesday, June 24, 2026

Legislative Updates and Hot Topics

In this session, attendees will dive into the latest legislative, regulatory, and judicial developments impacting the insurance industry. As laws continually evolve, staying abreast of these changes is crucial to ensure compliance and to optimize tax strategies. Led by seasoned experts, this session will provide a comprehensive overview of recent legislative, regulatory, and judicial updates, their implications, and strategies for adapting to regulatory shifts.

Life & PC Roundtables

These interactive roundtable sessions provide an opportunity to exchange insights and share experiences with industry peers. Attendees will have an opportunity to ask questions, discuss specific scenarios, and seek advice from their peers. The breakout will allow for a more focused discussion on industry specific questions, issues, and trends.

All breakout sessions are moderator lead open discussions and will rely heavily on attendee experiences and participation. Please come prepared to share and learn.

Management Module

A preview of our plans for a new Stratus management module integrating teams and workflows across products and companies. Provide feedback that will help shape the design for this workflow management tool.

Advanced Retaliatory

This session will be a high-level strategic discussion and is designed for attendees familiar with the complexities of retaliatory taxes. Topics will include navigating the nuances for different domiciliary states, industry dynamics and potential tax planning strategies to mitigate the impact of retaliatory taxes.

Credits Module

Walk-thru of the new Stratus credit module that services GFA, along with an opportunity to provide feedback that will help shape the design for future credits beyond GFA.

How to Handle Audits

This session will provide a forum for a more focused discussion on different audit strategies and is focused on the process of handling different types of audits. Attendees will be asked to share their audit experiences to gain insight on how to document, prepare, and handle audits and how the audit results are communicated and documented for future reference.



Day 3: Thursday, June 25, 2026

Stratus Walk Thru

This will be a continuation of our interactive walk-thru of Stratus Premium Pro, allowing for further input and feedback from attendees.

Status Brainstorm & Conference Wrap Up

In our final session, we'll address any outstanding Stratus topics, reflect on key insights, and provide opportunities for discussion, feedback, and closing thoughts.