

What's Next Boomer Business Summit—AGENDA

Wednesday, March 26, 2008

7:30 a.m. – 6:30 p.m. EDT

Omni Shoreham Hotel 2500 Calvert Drive N.W. Washington, D.C.

- 7:00 a.m.** **REGISTRATION OPEN – East Registration**
Sponsorship Kiosk and Bookstore open all day
- 7:00 a.m. – 7:45 a.m.** **BREAKFAST – Hampton Ballroom**
- 8:00 a.m. – 8:45 a.m.** **RISE AND SHINE – Session 1 – Capitol Room**
Entrepreneurs
Winning the hearts and minds of boomers and investors. Tips, tales, tactics that work.
Moderator: Jeff Williams, President, Founder, BizStarters
Speaker: Mary Furlong, Ed.D., CEO, Mary Furlong & Associates, Author, *Turning Silver into Gold*
Speaker: Andy Donner, Director, Physic Ventures, LLC
- RISE AND SHINE – Session 2 – Governor's Board Room**
Author! Expert! How To Build Your Brand
You wrote the book, you're an expert in the field, now build your brand as an author and expert.
Tips you can use to build awareness, recognition and opportunity.
Moderator: Brent Green, Author, *Marketing to Boomers*
Speaker: Ken Gillett, Marketing Manager, Targeted Marketing
Speaker: Karen Murgalo, Vice President, Editorial Director, Springboard Press
- RISE AND SHINE – Session 3 – Calvert Room**
Stress less today.
Learn the latest tools, technologies, and techniques to stress less.
Moderator: Robin Raff, Vice President, Director of Health and Wellness, Seismicom, Inc.
Speaker: Dr. Kathleen Hall, Founder and CEO, The Stress Institute
Internationally recognized stress and work-life balance expert
Speaker: Deborah Rozman, Ph.D., Psychologist, President and CEO QuantumIntech/
Heartmath, Inc.
Speaker: Brian Berchtold, President, CEO and Founder, ALCis Health, Inc.
- 9:00 a.m. – 9:05 a.m.** **CONFERENCE OPENING – Sandra Y. Johnson – Empire Room**
- 9:05 a.m. – 9:15 a.m.** **WELCOME REMARKS – Mary Furlong, Ed.D.**, CEO, Mary Furlong & Associates, Author,
Turning Silver into Gold
- INTRODUCTION OF VINCENT R. REINHART**
Mary Beth Franklin, Senior Editor, Kiplinger's Personal Finance
- 9:15 a.m. – 9:40 a.m.** **MORNING SESSION 1 – Empire Room**
The economy, housing and boomers. What's ahead?
Vincent R. Reinhart, Resident Scholar, American Enterprise Institute (AEI)
One of the nation's leading economists shares perspectives on the 2008 economic forecast
paying attention to the future of interest rates, housing, global changes and the demographics
of the boomer population.

More than half of online financial news readers are over 45.

What's Next Boomer Business Summit—AGENDA

9:45 a.m. – 10:30 a.m. MORNING SESSION 2 – Empire Room
Where do boomers gather?

Print, TV, online – Where are boomers today and where will they spend their time tomorrow? Hear from the people who have them, want them and are trying new ways to attract them to their properties.

Moderator: Mary Furlong, Ed.D., CEO, Mary Furlong & Associates

Speaker: Judy Diaz, Managing Director, Brand Strategy, PBS

Speaker: Brad Knight, President, Retirement Living TV

Speaker: Valerie May, Consulting Executive Editor, Online, *AARP THE Magazine*

Speaker: Gary Moulton, Senior Product Manager, Microsoft

Speaker: Dr. Brent Ridge, Vice President of Healthy Living, Martha Stewart Living Omnimedia, Inc.

10:30 a.m. – 10:45 a.m. MORNING BREAK – Empire Foyer Area

10:45 a.m. – 11:35 a.m. MORNING SESSION 3 – Empire Room
Partnering for success

One of the fastest ways to increase your business is through the right partnerships that give you access to the right customers, and give your partner great value for their customers. Hear what some of the biggest brands in the country are seeking in partners.

Moderator and speaker: Jeff Zimman, CEO, Posit Science Corporation

Jeff will discuss and profile partnerships from audience.

Speaker: Shereen Remez, Group Executive Officer, Member Value, AARP

11:35 a.m. – 12:00 a.m. MORNING SESSION 4 – Empire Room
What's next for Gail Sheehy?

Moderator: Myrna Blyth, Author, *Spin Sisters* and Founding Editor of *More Magazine*

Speaker: Gail Sheehy – Author, *Passages* and upcoming book on caregiving

Speaker: Ken Scherer, CEO, *Motion Picture & Television Fund Foundation*

12:00 p.m. – 1:00 p.m. LUNCH – Ambassador Ballroom

Authors, analyst, media and age-beat reporters, portal partner

Pick a topic, join a table and engage in discussion about boomers and business.

1:15 p.m. – 1:45 p.m. AFTERNOON SESSION 1 – Empire Room
Technology—what's new, what's cool

Technology: What's new in technology. Thoughts about trends, boomers and new markets.

Walt Mossberg, Personal Technology Columnist, *Wall Street Journal*

1:45 p.m. – 2:30 p.m. AFTERNOON SESSION 2 – Empire Room
What's next—tech ones to watch

New products, services, technologies aimed at the boomer market. Hear about their marketing and partnering strategies, their niche in the market, and how they plan to win the hearts and pocketbooks of boomers.

Moderator: Bill Johnston, Director, Community and Research, Forum One Communications

Speaker: Jeff Hasen, Chief Marketing Officer, HipCricket

Speaker: Paul Hedtke, Senior Director, Business Development, Qualcomm, Inc.

Speaker: Mark Hines, Associate Director, Segmentation, Verizon Wireless

Speaker: Cathy Jones, President/CEO, Phonak, LLC

Boomers represent between 38% - 40% of Internet users.

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2:45 p.m. – 3:30 p.m. **BREAKOUT TRACK 1 – Calvert Room**

1. Financing longevity

Living longer is great, but can boomers finance it? Hear about new ways to finance a longer life and how investment companies are turning from accumulation to income strategies.

Moderator: *Barton Johnson*, President and CEO, Life Stages Financial, Inc.

Speaker: *Cheryl MacNally*, Vice President, National Sales Manager Senior Products, Wells Fargo Home Mortgage

Speaker: *Steve Zaleznick*, CEO, Longevity Alliance

2. Marketing to women – Governor's Boardroom

Find out successful ways to reach boomer women. What do they want... and not want... from companies.

Moderator: *Carol Orsborn*, Author *Marketing to Women*; Vice President, Fleishman-Hillard, Co-Chair, FH Boom

Speaker: *Sheryl Biesman*, Manager of Internet Marketing, Nature Made

Speaker: *Jane Glenn Haas*, Founder, WomanSage

Speaker: *Lisa Stone*, Co-Founder, CEO, BlogHer

3. Social networks and blogs for boomers – Capitol Room

Social networks are all the rage with younger generations, but is it also a successful way to reach baby boomers? If you build it, will they come... and buy?

Moderator and speaker: *Bill Johnston*, Director, Community and Research, Forum One Communications

Speaker: *Nick O'Neill*, AllFacebook.com, Owner

Speaker: *Elisa Camahort Page*, Co-Founder, COO, BlogHer

Speaker: *Pepper Schwartz*, Schrag Professor of Sociology, University of Washington; Author, *Prime: Advice and Adventures on Sex, Love and the Sensuous Years*; Relationship Expert, PerfectMatch.com

3:30 p.m. – 3:45 p.m. **AFTERNOON BREAK – East Registration Area**

3:45 p.m. – 4:30 p.m. **BREAKOUT – TRACK 2 – Calvert Room**

1. Brand and Cause related marketing

Research shows that boomers are faithful to their causes. How can your business use cause related marketing to connect with boomers in new ways?

Moderator: *Jan Yanehiro*, Broadcast Journalist, Media Consultant

Speaker: *Belinda Lang*, Vice President, Consumer Marketing Strategy, American Express Company

Speaker: *Barbara Shipley*, Director, Brand Integration, AARP

Speaker: *Steve Siegel*, Vice President of Brand Solutions, HipCricket

2. Caregiving – Governor's Boardroom

With over 40 million caregivers in the country, the market potential is huge. But what do they need? How do you find them and market successfully to them? Hear from the experts.

Moderator: *Myrna Blyth*, Founding Editor, *MORE Magazine*, Author, *Spin Sisters*, *How to Raise an American*

Speaker: *Gail Sheehy*, Journalist, Author, *Passages*, *Men's Passages*, and *Sex and the Seasoned Woman*; *Pursuing the Passionate Life* and an upcoming book on caregiving

Speaker: *Dr. Sandra Timmerman*, Assistant Vice President and Director, MetLife Mature Market Institute

3. Mobile marketing – Capitol Room

Phones, PDAs, all sorts of ways to reach boomers on the go. What can work best for your business? Hear from those who are reaching them today in new ways.

Moderator: Jody Holtzman, Vice President, Knowledge Management, AARP

Speaker: Mark Hines, Associate Director, Mature Segment, Verizon Wireless

Speaker: Jeff Hasen, Chief Marketing Officer, HipCricket

4:45 p.m. – 5:30 p.m. BREAKOUT – TRACK 3

1. Healthy living and lifestyles – Calvert Room

Reduce stress, eat healthfully, exercise. What are the trends in boomer healthful living? What are these consumers looking for in products and services?

Moderator: Dr. Kathleen Hall, Founder and CEO, The Stress Institute, Internationally recognized stress and work-life balance expert

Speaker: Andy Donner, Director, Physic Ventures, LLC

Speaker: Steve French, Executive Vice President, Natural Marketing Institute

Speaker: Rod Falcon, Director, Health Horizons Program, Institute for the Future

2. New media marketing – Governor's Boardroom

How do you reach boomers through new media effectively and cost efficiently? SEO, e-mail, PPC. Get tips from new media marketing experts.

Moderator: Laura Weber Rossman, Chief Marketing Officer, Longevity Alliance

Speaker: Sheryl Biesman, Director of Internet Marketing, Nature Made®

Speaker: Jeff Hasen, Vice President of Brand Solutions, HipCricket

Speaker: Wendy Borow-Johnson, President, BOOMj.com, Inc.

3. Housing trends for boomers – Capitol Room

For many people their wealth is wrapped up in their home. How will they tap the equity to pay for a longer life? Or will they take the equity and head south and southwest like previous generations? What are the trends in housing and how boomers will use their "home wealth."

Moderator: Peter Bell, President, National Reverse Mortgage Lenders Association

Speaker: Wendy Beerbower, Vice President, Sales, EquityKey

Speaker: Barton Johnson, President and CEO, Life Stages Financial, Inc.

5:30 p.m. – 5:35 p.m. Sandra Y. Johnson – Empire Room

5:35 p.m. – 5:45 p. m. Texting for Good – Empire Room

Inspirational close; preview of What's Next 2009 at Paris Hotel in Las Vegas, Nevada

6:00 p. m. – 7:00 p.m. Networking Reception – Empire Room

Featuring Sandra Y. Johnson Jazz Quartet

*75% of baby boomers believe the
upcoming 2008 Presidential election
will be more important than past elections.*

According to MetLife research on the American Dream
