



Loss Executive Association
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88th SPRING EDUCATIONAL CONFERENCE

Newport Marriott, 25 America's Cup Avenue, Newport, RI 02840

June 14 – 16, 2023

Wednesday, June 14, 2023

- | | |
|------------------------|---|
| 11:00 – 5:00 pm | Registration Opens |
| 8:00 – 5:00 pm | Speaker Ready Room Available |
| 8:00 am | LEA Golf Tournament
Newport National Golf Club
324 Mitchell's Ln, Middletown, RI 02842 |
| 5:30 – 7:30 pm | Opening Night Reception
<i>(Open to All Registered Attendees. Name badges are required for admittance into the reception and other LEA events.)</i> |

Thursday, January 15, 2023

- | | |
|------------------------|--|
| 8:00 – 9:00 am | Continental Breakfast |
| 8:00 – 5:00 pm | Registration Desk Open |
| 8:00 – 12:00 pm | Speaker Ready Room Available |
| 8:15 – 9:00 am | General Session/Members Meeting |
| 8:15 – 8:20 am | Welcome/Anti-Trust Admonition Policy
Costantino Suriano, Esq., Partner
<i>Mound Cotton Wollan & Greengrass LLP</i> |
| 8:20 – 8:30 am | Opening Remarks & Introductions
Raymond Mattia, Vice President, Commercial Property Claims
<i>AIG</i> |
| 8:30 – 8:35 am | Treasurer's Report
Marisa Jelicks
Senior Litigation Commercial Property Examiner for North America
<i>Liberty Mutual</i> |
| 8:35 – 8:40 am | Membership Report
Margaret A. (Peggy) Reilly
<i>Edward R. Reilly & Co., Inc.</i> |
| 8:40 – 8:50 am | Continuing Education & Golf Report
Louis D. Magnan, CPA
<i>J.S. Held, LLC</i> |

8:50 – 9:00 am	<p>Program Overview Steve Yeo, Group Head of Claims <i>Lancashire Insurance Group</i></p>
9:00 –10:00 am	<p>Infrastructure: Understanding the Risk, Assessing the Loss and Analyzing Coverage Issues <i>Property insurers are well aware that a changing climate will pose increasing, and potentially new, risks to their business resulting in increased losses. Proactively managing these risks to mitigate losses requires a sound understanding of the relevant changes in the climate and having viable, prioritized options that can be implemented over time. This course will provide a basic understanding of changing climate risk and provide a framework which has proven successful for addressing such risks and their loss adjusting through public/private partnerships.</i></p>
Speaker	<p>Dr. Louis Gritzko, Vice President, Research <i>FM Global</i></p>
10:00 – 10:15 am	Refreshment Break
10:15 – 11:15 am	Introduction of Guest Speaker
Topic	Actuarial Science: Going Beyond the Pocket Protector
Speaker	<p>Lela Patrik, FCAS, MAAA, Actuarial Principle <i>PricewaterhouseCoopers (PwC)</i></p>
11:15 – 12:15 pm	<p>Property Case Law Update <i>The landscape of property insurance law is ever evolving and adjusters should have an understanding of how recent developments and trends affect their day-to-day work. In selecting cases for the presentation, we have sought to draw from a broad and diverse range of subject areas and fact patterns. This session will present cases in such a manner that the legal principles involved are easily translatable to the practical impacts they may have in the attendees’ work. This session will close the discussion of each case with some “practical takeaways” that may have a tangible impact on attendees looking to develop and refine their technical skills.</i></p>
Moderator	<p>James Preston, Senior Property Examiner <i>Liberty Mutual Insurance</i></p>
Speakers	<p>Jeremiah O’Leary, Partner <i>Finazzo Cossolini O’Leary Meola & Hager LLP</i></p> <p>Brandon Sipple, Partner <i>Finazzo Cossolini O’Leary Meola & Hager LLP</i></p>
12:15 – 1:30 pm	<p>Lunch <i>(Open to all registered attendees)</i></p>
1:30 – 3:30 pm	<p>Concurrent Workshops 2-Hour Sessions (Select One) <i>Workshop meeting room locations are posted on the “Location Board” in the Ballroom Foyer as well as in front of each workshop room.</i></p>

Workshop 1 (2 Hours)

Technology in a Rapidly Changing Claims World

Many insurance professionals may benefit from being more aligned with new technological advancements in the world that may be applicable to our industry, yet this will become imperative to handle a changing property claims world. Likewise, our insureds will simultaneously benefit from this more technologically advanced operating method which will ultimately lead to better underwriting results and profitability which will continue to be challenging.

This session will help educate the audience on potential technological advances in the insurance claims industry that will continue to become more important with a rapidly change world and climate. As storms and CATs become more unpredictable and severe, we will need to quickly adjust as an industry and technology can help us move this process forward in faster more efficient matter. Inflation, civil unrest, and supply chain issues show no end in sight.

Presenters

Milica Aksic, CPCU, AIC, Sr. Vice President
NovaData Solutions LLC

Meghan Fountain, Director of Claims
Velocity Risk

Maureen Myre, Claims Manager – Energy, Property & Construction
AXA XL

Aubrey Shea, Executive Vice President
JS Held

Workshop 2 (2 Hours)

Policy Challenges, Inter-Insurer Interactions, and Effective Claim Handling in the Market Environment

Effective handling of market claims can present numerous challenges, arising from differences in policy wording between and among layers of coverage, use of different policy forms (e.g., broker v. proprietary forms), differing views on coverage, and differences over establishing the quantum of loss and setting appropriate reserves. The panel will discuss these issues and others arising in the context of market claims, with an emphasis on strategies to achieve fair and efficient claim resolution.

Moderator

Ray DeMeo, Counsel
Robinson & Cole

Panelists

William Casali, Complex Claims Director
Berkshire Hathaway

Marco DeLeon, Sr. Executive General Adjuster
McLarens

Workshop 3 (2 Hours)

Decoding BI Terminology: Speaking the Same Language: Understanding What BI Terms Mean to All the Sides of a Claim

This session is aimed at helping to gain an understanding and further insight regarding specific terminology in Business Interruption, how it is interpreted differently by forensic accountants working on the carrier side and the broker side. Participants will leave with a more in-depth

understanding of why these certain topics are sources of contention, but gain a deeper understanding of how each 'side' is interpreting the language.

Moderator

Joseph Scarlato, President, Director of International Operations
Lowers Forensics

Participants

Danielle Gardiner, Sr. Vice President
Lowers Forensics International

William Stromeyer, Sr. General Adjuster
Starr Technical Risks

Maricarmen Marquez, Latin American Practice Leader
Willis Towers Watson

Jonathan Pirie, Managing Director
AnKura

3:30 – 3:45

Refreshment Break

3:45 – 4:45 pm

**Concurrent Workshops (Cont.) Select One
1-Hour Sessions**

Workshop meeting room locations are posted on the "Location Board" in the Ballroom Foyer as well as in front of each workshop room.

Workshop 4 (1 Hour)

Electrical Losses Involving Batteries

Battery systems are becoming more common, more complex, and increasingly involved with large losses. This course will provide insights into the equipment, uses, and failure modes of battery systems with the goal of providing baseline knowledge for adjusters to utilize during their analysis of a claim or dispute.

Participants

Houston Estes, Executive General Adjuster
Crawford GTS

Jonathan Jordan, Senior Managing Consultant
ESi

Tracy Shook, AVP, North American Property Claims
Sompo International

Workshop 5 (1 Hour)

Risk Analysis for Contested Claims: The Importance of How and Where

Utilizing hypothetical claim scenarios, this session will examine how the nature of the issue in dispute can impact the risk associated with a disputed claim in different jurisdictions. The presentation will discuss strategies to mitigate the impact of "social inflation" and demonstrate that understanding how a dispute will be resolved is essential to understanding risk. For example, certain types of issues cannot be resolved without a jury trial. While some cases should be tried, the risk and cost associated with litigation should be understood early in the process. In some jurisdictions, appraisal can be a highly effective tool to resolve certain disputes. In others, it is not a desirable option. It is essential that claims professionals understand how and where a dispute is ultimately going to be resolved to accurately analyze the potential of favorable resolution.

Participants

Andrew Sveen, Sr. Claims Manager, Property & Inland Marine
Intact Insurance Specialty Solutions

Paul Sullivan, Partner
Zelle LLP

Annette Tarquinio, Sr. Executive General Adjuster
Engle Martin

Workshop 6 (1 Hour)

Fostering and Empowering the Insurance Industry to Attract & Retain New and Diverse Talent

The industry is struggling to attract and retain new and diverse talent and what we are finding is that many companies, organizations, and industries are motivated to engage in the conversation, but are unsure on how to put real resources or affect change behind diversity, equity, and inclusion programs.

This session will provide an overview of the insurance industry and current key metrics as compared with other industries, including metrics relating to Diversity, Equity and Inclusion (DEI). Panelist will review the business case and recent research for attracting and retaining new and diverse talent. Panelist will discuss their own company’s efforts, success and lessons learned on allyship and sponsorship at both the corporate and individual levels. Panelists will also discuss a call to action and provide resources for next steps.

Participant

Juliet Hamilton, Head of Short Tail Claims
Canopus Group

Ruchika Kaur, P.E., Associate Principal
Thornton Tomasetti

Christina Lincoln, Partner
Robins Kaplan

Dominic Thurston, Vice President – Global Catastrophe
FM Global

5:30 – 7:30 pm

Casual Outdoor Reception (*Weather Permitting*)
(*Open to all LEA registrants*)

Friday, January 16, 2023

7:30 – 11:45 am

Registration Desk Open

7:30 – 8:30 am

Continental Breakfast (*Open to all registered attendees*)

8:30 – 10:30 am

Repeat of Two-Hour Concurrent Workshops
Select One

Workshop 1 (2 Hours)

Technology in a Rapidly Changing Claims World

Workshop 2 (2 Hours)

Intra-Insurer Conflicts on Market Losses

Workshop 3 (2 Hours)

Decoding BI Terminology: Speaking the Same Language: Understanding What BI Terms Mean to All the Sides of a Claim

10:30 – 11:00 am

Refreshment Break

11:00 – 12:00 pm

Repeat of One-Hour Concurrent Workshops

Select One

Workshop 4 (1 Hour)

Workshop 5 (1 Hour)

Workshop 6 (1 Hours)

Electrical Losses Involving Batteries

Risk Analysis for Contested Claims: The Importance of How and Where

Fostering and Empowering the Insurance Industry to Attract & Retain New and Diverse Talent

12:00 pm

Conference Adjournment

An LEA officer will provide concluding remarks at the end of each workshop session.

CE Credit Requirements:

Please remember that CE forms are to be signed by only an authorized LEA CE delegate and/or by the instructor of each session.

CE credits are available based on your individual attendance at each session.

All forms, including your license number, are to be submitted at the close of the conference. There will be no exceptions for credit if your forms are not submitted and for missing license numbers.

Photography Waiver:

By attending the LEA session you consent that your picture may be in one of the photographs that are taken during the LEA conference. The photos may be published or otherwise used by the LEA, which retains exclusive ownership thereof and this consent is voluntary with no expectation of compensation now or in the future.

To Register: Visit the LEA website at www.lossexecutives.com

These presentations are for educational purposes only. The thoughts conveyed here are those of the panel members and are not the views of any companies, firms, or the LEA. The presenters are the professionals solely responsible for the content of these presentations.

Program Committee: Steve Yeo - Lancashire Insurance Group
Niacole Borecki - Halliwell Engineering



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4.26.23