



94th ANNUAL EDUCATIONAL CONFERENCE
Marriott Harbor Beach Hotel
January 22 – 24, 2025

Wednesday, January 22, 2025

- | | |
|------------------------|---|
| 11:00 – 5:00 pm | Registration Opens |
| 8:00 – 5:00 pm | Speaker Ready Room Available |
| 7:30 am | 2025 LEA Annual Golf Outing
Jacaranda Golf Club
9200 West Broward Blvd.
Plantation, FL 33324 |
| 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 23, 2025

- | | |
|------------------------|---|
| 8:00 – 9:00 am | 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
Jose Mogartoff, LEA President
Director of Energy & Marine Claims
<i>Zurich NA</i> |
| 8:30 – 8:35 am | Treasurer's Report
Brooke Shultz
Senior Adjuster
<i>FM</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 | Program Overview
Steve Yeo, Group Head of Claims
<i>Lancashire Insurance Group</i> |

9:00 –10:00 am	<p>General Session Negotiating and Managing Key Supplier Relationships <i>Gain a comprehensive understanding of negotiation principles and strategies as articulated in "Getting to Yes," specifically within the context of insurance claims adjusting and settling claims. The session emphasizes the importance of trust, communication, and cooperative approaches in negotiation.</i></p>
Speaker	<p>Mark Gordon, Partner <i>Vantage Partners</i></p>
10:00 – 10:15 am	Refreshment Break
10:15 – 11:15 am	<p>The Claims Industry - The Brokers Perspective <i>This session will provide insights from senior industry leaders on the past, present, and future of the insurance industry. Topics include the evolution of claims and broking roles, the alignment of industry goals, and the market's preparedness to address talent gaps. It also explores effective leadership, talent management, and the changing priorities of brokers, with discussions on claims advocacy, expectations from loss adjusters and lawyers, and sustainability in risk management.</i></p>
Moderator	<p>Thomas Thornberry, Group Chief Claims Officer <i>Zurich</i></p>
Speakers	<p>Rob Powell, Global Chief Claims Officer <i>Marsh</i></p> <p>Neil Harrison, Global Head of Claims – Corporate Risk & Broking <i>WTW</i></p>
11:15 – 12:15 am	<p>What Does Great Loss/Independent Adjusting Look Like and How Much Does It Cost? <i>This presentation will provide insights into effective claims handling from the adjusting community, focusing on how insurers can influence outcomes and costs. It features a panel discussion moderated for audience engagement via Slido, covering key topics such as metrics for effective adjusting, the impact of claims handling on loss adjuster expenses, and recommendations for future improvements. This session is essential for professionals aiming to enhance collaboration and best practices in claims adjusting within the insurance industry.</i></p>
Moderator	<p>Leo Dixon, Global Head of Claims <i>Swiss Re</i></p>
Participantes	<p>Tamira Hunter, Complex Claim Adjuster <i>AIG</i></p> <p>Maureen Myre, Claim Manager, Energy, Property & Construction Claim <i>AXA XL</i></p> <p>Phil Moretti, Managing Director, Senior Executive Adjuster <i>Integra</i></p>
12:15 – 1:30 pm	<p>Luncheon <i>(Open to All Registered Attendees. Name badges are required for admittance into the reception and other LEA events.)</i></p>

1:30 – 3:30 pm

Concurrent Workshops

2-Hour Sessions (Select One)

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

Workshop 1 (2 Hours)

The Business Interruption Implications of Wide Area Damage Revisited: The Impact of Global COVID Legislation

This session will look at an analysis of how global Covid legislation including the landmark FCA test case and Supreme Court ruling in the UK and the Australian test case has altered the previous understanding of how Wider Area Losses should be measured and the implications for losses insured under US law.

Moderator

Mark Lewis, Managing Director
C Lewis & Co.

Participants

Jamie Davy, Property Claims Manager
Lancashire Insurance

Grace Hansen, Chief Claims Officer
Hippo Insurance

Deanna Manzo, Partner
Mound Cotton Wollan & Greengrass LLP

Workshop 2 (2 Hours)

Strikes, Riots and Civil Commotion in Latin America – Origins and Policy Interpretations

Given the political and social volatility in Latin America, SRCC events can arise unexpectedly, causing significant disruption and financial losses. Insurance professionals need to be well-versed in navigating the challenges of adjusting claims related to SRCC events. This course is essential for those involved in claims adjustment, underwriting, and risk management in the region, providing them with the tools and knowledge to respond effectively and safeguard against such risks.

Moderator

Richard Paton, Senior Claims Manager
Munich Re, Bogota

Participants

Steven Clayton, President
Sedgwick, Mexico

Miguel Gutierrez Zalvidea, Head of Claims P&C
Rimac Seguros y Reaseguros, Peru

Angelo Hettich, Director of Engineering Risks
McLarens, Chile

Marco Rivera, Partner
Kennedys Law Firm, Peru

Guillermo Sparks, Country Manager
McLarens, Argentina

Workshop 3 (2 Hours)

Conventional Power Gen Loss Scenarios

This session will do an in-depth exploration of power generation loss event scenarios and the associated insurance-related issues. This session covers real-world examples of failures in boilers, turbines, generators, and transformers at power plants, viewed from both engineering and accounting perspectives. Participants will engage in case studies, reviews, and discussions on investigation processes, providing essential knowledge for analyzing claims.

Participants

Mike Casey, Executive Vice President
J.S. Held, LLC

Ed Feloni, Managing Director
CEG Forensics

Peter Jones, Partner
Buchanan Clarke Schlader

Mike Thomas, Partner
MGTA Group

3:30 – 3:45 pm

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)

Canadian Wildfires – It is Not Always Cold in the Great White North

There have been several significant wildfire events in Canada (particularly in the west) in the past 10 years. Our object is to inform attendees on the extent of the wildfire activity (and other large events), how Canada may differ from other places in North America and discuss the significant issues that have arisen during these events.

Participants

Chris Ford, Loss Adjuster
Lloyd Warwick – Vancouver

Michael Martow, Executive General Adjuster
ClaimsPro

John Murray, Vice President, Property & Program Claims
AIG Canada

Scott Schellenberg, Partner
MDD Calgary

Workshop 5 (1 Hour)

The Transformative Power of Artificial Intelligence in Claims Management

As artificial intelligence becomes an integrated part of the insurance claims process, industry professionals should be aware of recent developments to be effective change agents within their organizations.

Participants

Kristian Alfanso, Staff Counsel
Intact Insurance

Mike Gaudet, Managing Director
J.S. Held, LLC

Workshop 6 (1 Hour)

Global Risks – A “Heads Up”

This session will explore the challenges of placing business and handling claims across various countries and regions. Insights from underwriters, risk managers, and forensic accountants will provide property claims professionals with valuable perspectives on unique claims issues. The course is essential for those managing global risks with local and master policies, addressing common challenges that often arise "after the fact" in global policies. It aims to enhance awareness and prepare professionals for potential issues in advance.

Participants

Brad Ebel, Partner/President
MDD

Mark Johnstone, National Risk Management Leader
Purves Redmond Limited

Juan Lopez-Santini, Partner
QLDG

Michael Robertson, Sr. Underwriting Manager
Liberty Specialty Markets

5:30 – 7:30 pm

Casual Outdoor Reception

(Open to All Registered Attendees. Name badges are required for admittance into the reception and other LEA events.)

Friday, January 24, 2025

7:30 – 11:45 am

Registration Desk Open

7:30 – 8:30 am

Breakfast *(Open to all registered attendees)*

8:30 – 10:30 am

Repeat of Two-Hour Concurrent Workshops
Select One

Workshop 1 (2 Hours)

The Business Interruption Implications of Wide Area Damage Revisited: The Impact of Global COVID Legislation

Workshop 2 (2 Hours)

Strikes, Riots and Civil Commotion in Latin America – Origins and Policy Interpretations

Workshop 3 (2 Hours)

Conventional Power Gen Loss Scenarios

10:30 – 11:00 am

Refreshment Break

11:00 – 12:00 pm

Repeat of One-Hour Concurrent Workshops
Select One

Workshop 4 (1 Hour)

Canadian Wildfires – It is Not Always Cold in the Great White North

Workshop 5 (1 Hour)

The Transformative Power of Artificial Intelligence in Claims Management

Workshop 6 (1 Hours)

Global Risks – A “Heads Up”

12:00 pm

Conference Adjournment

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

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

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 LEA sessions, 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.*

Presentations *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.*

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



LEA Board of Directors

OFFICERS

President

Jose Mogartoff
Zurich N.A.

Vice President

Marisa Jelicks
Liberty Mutual Insurance

Treasurer

Brooke Shultz
FM

Secretary

Dominic Thurston
FM

Asst. Secretary

Brian St. Jacques
AIG Energy and Engineered Risk

Immediate Past President

Raymond Mattia
AIG

BOARD OF DIRECTORS

Paul Aviles
Allied World Assurance Company (USA) Inc.

Paul Carnovale
AEGIS Insurance Services, Inc.

Nicole Nancke
Zurich Canada

Richard Paton
Munich Re

Steven Yeo
Lancashire Insurance Group

Program Chairman

Steven Yeo
Lancashire Insurance Group

Executive Director

Membership Chair/Web Master

Margaret A. Reilly
Edward R. Reilly & Co., Inc.

Counsel

Costantino Suriano, Esq.
Mound Cotton Wollan & Greengrass LLP

Board Consultant

Scott Armstrong
J.S. Held LLC

Accountant

Maria Geyer
MDD Forensic Accountants

CE Coordinator

Louis D. Magnan, CPA
J.S. Held LLC

Meeting Coordinator/Event Planner

Maria Sclafani
The Beaumont Group, Inc.

Web Support

Maria Suliman
Edward R. Reilly & Co., Inc.