



**Celebrating 89 Years of
Promoting Professionalism
& Personal Growth**

**2020
ANNUAL MEETING
& EDUCATIONAL
CONFERENCE**

JANUARY 15–17



**Keynote Speaker
Morgan Luttrell
Former Navy SEAL, Lieutenant
& Former Sr. Advisor Veteran
Relations with the DOE**



**Fort Lauderdale
Marriott Harbor Beach Resort,
Fort Lauderdale, FL**

Photograph Credit
Sonya Szostak

wednesday
january

15
agenda

8:00 – 5:00 pm

REGISTRATION OPENS

Ocean View Terrace Liana

8:00 – 5:00 pm

SPEAKER READY ROOM AVAILABLE

Tallahassee Room (2nd Floor)

8:30 am

**ROD BIRMINGHAM MEMORIAL
GOLF OUTING**

Jacaranda Golf Club

9200 West Broward Boulevard
Plantation, FL 33324

5:30 – 7:30 pm

OPENING NIGHT RECEPTION

*Oceanview Terrace (Weather Permitting)
(Open to All Registered Attendees)*



thursday
january

16

agenda

7:30 – 9:00 am

CONTINENTAL BREAKFAST

Grand E-F Foyer (3rd Floor)

8:00 – 5:00 pm

REGISTRATION DESK OPEN

Grand E-F Foyer (3rd Floor)

8:00 – 12:00 pm

SPEAKER READY ROOM AVAILABLE

Tallahassee Room (2nd Floor)

8:00 – 8:45 am

GENERAL SESSION/MEMBERS MEETING — *Grand E-K (3rd Floor)*

8:00 – 8:05 am

WELCOME/ANTI-TRUST



**COSTANTINO
SURIANO, ESQ.**

Partner
Mound Cotton Wollan & Greengrass LLP

8:05 – 8:15 am

OPENING REMARKS



**PAUL
AVILES**

LEA President
Senior Vice President
North American Property Claims Group
Allied World Assurance Company (USA) Inc.

8:20 – 8:25 am

TREASURER'S / GOLF REPORTS



**THOMAS D.
CASSON**

AG Commercial Property and Energy
Property Claims Field Group Lead
AIG

2019 SPRING BERMUDA MEETING
PHOTO GALLERY



8:30 – 8:35 am

MEMBERSHIP REPORT



**MARGARET A.
(PEGGY) REILLY**

Edward R. Reilly & Co., Inc.

8:40 – 8:45 am

CONTINUING EDUCATION REPORT



**LOUIS D.
MAGNAN, CPA**

J.S. Held

8:45 – 9:00 am

PROGRAM OVERVIEW &
INTRODUCTION OF KEYNOTE
SPEAKER



**PAUL
AVILES**

LEA President
Senior Vice President
North American Property Claims Group
Allied World Assurance Company (USA) Inc.



9:00 – 10:00 am

KEYNOTE SPEAKER

Speaker



**MORGAN
LUTTRELL**

Former Navy SEAL
Lieutenant & Former Sr. Advisor
**Veteran Relations with the Department
of Energy**

To maximize results, Morgan Luttrell has focused on principals from the military's Mission Success Philosophy. His dedication to teamwork and collaboration has established him as an influential force across several industries. Discipline honed from his military experience, combined with his dedication to using machine learning and artificial intelligence, to compute complex data has led to the breakdown of silos, faster more precise statistical outcomes, and the creation of cross-functional teams that have resulted in a greater impact for companies and causes.

10:00 – 10:15 am

REFRESHMENT BREAK

Grand E-F Foyer (3rd Floor)

10:15 – 11:15 am

**VIRTUAL CURRENCY &
BLOCKCHAIN - EMERGING
INSURANCE INDUSTRY ISSUES**

The program is intended to provide a brief summary of cryptocurrency (specifically "Bitcoin"), and the technology upon which it is based (Blockchain), and the potential impact and use of both in the insurance industry, as well as an overview of associated issues.

The world of money, finance and insurance is transforming daily. Digitized assets and innovative financial channels, instruments and systems will be, and indeed are, impacting

the insurance industry. Many of the features of Bitcoin and Blockchain are novel and can be difficult to comprehend. Accordingly, an overview of the technology and its application to the insurance marketplace will assist professionals in understanding, and hopefully defining, new paradigms of use that benefit both the individual and the industry as a whole. This session is designed as an interactive workshop that will introduce the concepts, their use and relevance, as well as potential benefits and risks to promote a meaningful and engaging discussion.

Speakers



**MICHAEL T.
VANNUCCI**
CPA, CFE, CFF

Meaden & Moore



**JEFFREY S.
WEINSTEIN, Esq.**

Partner

Mound Cotton Wollan & Greengrass





11:15 – 12:15 pm

THE PROPERTY CASE LAW UPDATE

Give us 60 minutes and we'll give you the year in review! Bill Erickson, Bill Webster, James Kitces and Liz Burnett of Robins Kaplan LLP will update you on the most interesting property insurance case decisions of the past year. Cases illustrating important trends in several areas will be featured, including the latest decisions on policy exclusions, flood coverage, physical loss, deductibles and sublimits, appraisal, jurisdictional provisions and other topics from the past year. The Property Case Update is not a lecture program. Join Bill, James, Bill and Liz for a fast-paced combination of audience participating and case discussion covering the recent cases and trends you need to know.

Moderator



**BILL
ERICKSON, ESQ.**

Partner
Robins Kaplan LLP

Participants



**A. LIZ
BURNETT, ESQ.**

Associate Attorney
Robins Kaplan LLP



**JAMES
KITCES**

Partner
Robins Kaplan LLP



**BILL
WEBSTER**

Partner
Robins Kaplan LLP

12:15 – 1:30 pm

LUNCH

*Ocean View Terrace (Weather Permitting)
(Open to All Registered Attendees)*

workshop

(2-Hours)

LEA CONCURRENT WORKSHOPS

1:30 – 3:30 pm 2-HOUR SESSIONS

ASSIGNMENT OF BENEFITS

Salon E (3rd Floor)

Many claims in Florida have seen an increase in assignment of benefits. The parameters of the claims, what is assigned, what is an appropriate assignment and who may take an assignment are not always clear. Florida decisions have created some confusion but also provide insight.

Moderator



**DAN
STEED**

Manager, London Operations
Engle Martin & Associates

Participants



**LOUISA
CHISHOLM**

Senior Claims Specialist
Liberty Specialty Markets



**KRISTIN
CUMMINGS**

Partner
Zelle, LLP



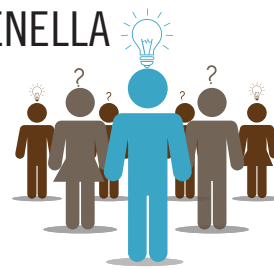
**SAMANTHA A.
FLAX**

COO and Co-Founder
Flax & Associates



**CHRISTINE
RENELLA**

Senior Associate
Zelle, LLP



workshop

(2-Hours)

EARLY & COMBINED INVOLVEMENT OF THE ADJUSTMENT TEAM: CONTROLLING THE COURSE AND THE COSTS OF MAJOR LOSSES

Salon F-K (3rd Floor)

This session will review the dynamics between the insurance company, the necessary consultants, the insured and their representatives. Through analysis of various cases, this session will demonstrate how the early and continuous involvement of all parties paves the way for swift and appropriate settlements. It will also review where a "hands off" approach can lead to a disastrous increase in claim values and an adversarial relationship. The goal of this presentation is to relate the personal experiences of the claim professionals in attendance to the subject matter.

Case One – Refinery Explosion

Case Two – Builder's Risk Claim for High Rise Office Construction

Case Three – Wood Pellet Manufacturer Fire

Moderator



**AUBREY
SHEA**

Vice President
J.S. Held

Participants



**MARK
ANDREWS**

Associate Principal
Thornton Tomasetti



**MAUREEN S.
MYRE**

Claim Manager
AXA XL



**MICHELLE
PERTESIS**

Vice President/Executive General Adjuster
Specialized Loss Adjusting
McLarens

workshop

(2-Hours)

BIG TECH: THE PRICE OF MODERN TECHNOLOGY

Grand A-D (3rd Floor)

Big Tech insureds present unique challenges to the claims environment as there are so many moving pieces – data centers, warehouses, distribution facilities – as well as potential data breach and other forms of cyber compromise – often with multinational concerns. This course will include a series of Case Studies as we explore the price of modern technology.

Moderator



**LIZ
PETERSON**

Managing Director, UK
Envista Forensics

Participants



**JEAN L.
BRODERICK, ARe**

Regional Practice Leader
Energy, Property & Construction Claims – NA
XL Catlin - AXA XL, a division of AXA



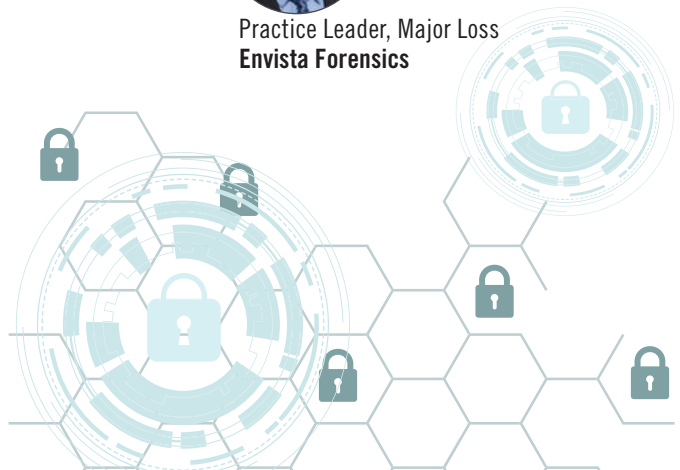
**STEVE
CERSINE**

Director of Property Claims
Allianz Global Corporate & Specialty (AGCS)



**MARK
EWING**

Practice Leader, Major Loss
Envista Forensics





**MARGUERITE
HART**, CPA, CFE

Partner
MDD Forensics



**DESMOND
SULLIVAN**

President
Lloyd Warwick International, NY

3:30 – 3:45

REFRESHMENT BREAK

Grand E-K Foyer (3rd Floor)



workshop

(1-Hour)

CONCURRENT WORKSHOPS (CONT.)

3:45 – 4:45 pm 1-HOUR SESSIONS

THE LLOYD'S MARKET – A LOOK AT LIFE INSIDE THE SQUARE MILE

Grand F-K (3rd Floor)

The Lloyd's of London insurance market and how it operates can sometimes be perceived as complicated, rigid and perhaps even old fashioned. This session aims to dispel these perceptions. Its aim is to clearly educate the attendee as to how claims are handled in the Lloyd's market, both domestically and in conjunction with international insurers.

This session will focus on the composition of the market. It will clearly explain the processes within Lloyd's claims handling and how these may differ from our international counterparts. It will also focus upon the individual roles various stakeholders perform.

In addition, there will be a specific focus on the 'Future at Lloyd's' and how this may change the claims landscape for future generations of claims professionals working within the 'Square Mile'.

Moderator



**DANIEL
TRENKEL**

Claims Manager
W/R/B Underwriting

Participants



**JAMIE
DAVY**

Senior Claims Adjuster
Cathedral Underwriting Ltd.



**ISAAC
FRANKS**

Senior Claims Specialist,
Energy, Property, Construction
AXA XL



**OWEN
LUDBROOK**

Director of Client Services, London
**Sedgwick Claims Management Services
Ltd. (Sedgwick)**



**LOUISE
VAN DER VALK**

Claims Manager
THB Group Ltd.



workshop

(1-Hour)

BUILDER'S RISK CLAIMS: RECURRING AND EMERGING ISSUES

Grand E (3rd Floor)

Builder's risk insurance, with its varied and often manuscripted policy wording, can present unique coverage and adjustment issues—along with traps for the unwary. This workshop will focus on several recurring and emerging issues in builder's risk claims, including challenges that can arise out of the naming of general contractors and subcontractors as additional insureds (whose claim is it?); the “exes” that vex (expediting expense, extra expense, and extended general conditions); and policy wording intended to constrain or clarify the insurer's obligations regarding particular types of losses.

Moderator



**SAMUEL H.
RUBY, Esq.**

Insurance Law Practice Group Leader
Bullivant Houser Bailey PC

Participants



**JOHN
ROBERTS**

Vice President
Specialty Energy & Construction Claims
AIG



**GRANGER
STUCK**

Executive Vice President
Builder's Risk Practice Lead
J.S. Held



workshop

(1-Hour)

BUILDING PERSONAL AND ORGANIZATIONAL RESILIENCE FOR DEALING WITH CRISIS AND LOSS: THE CASE OF SANDLER O'NEIL & PARTNERS — Grand A-D (3rd Floor)

The single most important factor necessary to increase an organization's ability to rebound from crisis and loss is the degree to which the organization and its people are **RESILIENT**. Resilience is the ability to absorb high levels of disruptive change and stress while displaying minimal dysfunctional behavior.

Personal resilience is directly related to the health, motivation and productivity of individuals. Organizational resilience is related to increased agility, adaptability and performance. When resilience is high, people feel energized, their work is exciting, and things seem to happen almost effortlessly. When resilience is low, people feel depressed, their work is monotonous, and everything seems like a chore. This workshop examines the relationship between personal and organizational resilience and identifies attributes, strategies, and methods for improving coping skills and building resilience for employees and customers.

Through individual and group exercises, participants will learn the factors that increase and decrease resilience and identify strategies and methods for building and maintaining resilience. The outcome of this workshop will be a grounded theory of action for improving personal and organizational resilience at the individual and organizational level following crisis and loss.

Speaker



**CHESTER
WARZYNSKI**

Principal Consultant
Warzynski Consulting Services

5:30 – 7:30 pm

CASUAL OUTDOOR RECEPTION

Oceanview Terrance (Weather Permitting)

friday
january

agenda

7:30 – 11:45 am

REGISTRATION TABLE OPEN

Grand E-K Foyer (3rd Floor)

7:30 – 8:30 am

CONTINENTAL BREAKFAST

Grand E-K Foyer (3rd Floor)

(Open to all registered attendees)

8:30 – 10:30 am

REPEAT OF TWO-HOUR CONCURRENT WORKSHOPS

Workshop 1 (2-Hours) — *Grand A-D (3rd Floor)*
ASSIGNMENT OF BENEFITS

Workshop 2 (2-Hours) — *Grand E (3rd Floor)*
**EARLY & COMBINED INVOLVEMENT
OF THE ADJUSTMENT TEAM:
CONTROLLING THE COURSE AND
THE COSTS OF MAJOR LOSSES**

Workshop 3 (2-Hours) — *Grand F-K (3rd Floor)*
**BIG TECH: THE PRICE OF
MODERN TECHNOLOGY**

10:30 – 11:00 am — *Grand E-K Foyer (3rd Floor)*
REFRESHMENT BREAK

11:00 – 12:00 pm

REPEAT OF ONE-HOUR CONCURRENT WORKSHOPS

Workshop 4 (1-Hour) — *Grand E (3rd Floor)*
**THE LLOYD'S MARKET: A LOOK
AT LIFE INSIDE THE SQUARE MILE**

Workshop 5 (1-Hour) — *Grand F-K (3rd Floor)*
**BUILDER'S RISK CLAIMS:
RECURRING AND EMERGING
ISSUES**



Workshop 6 (1-Hour) — Grand A-D (3rd Floor)

BUILDING PERSONAL AND ORGANIZATIONAL RESILIENCE FOR DEALING WITH CRISIS AND LOSS: THE CASE OF SANDLER O'NEIL & PARTNERS

12:00 pm

CONFERENCE ADJOURNMENT

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

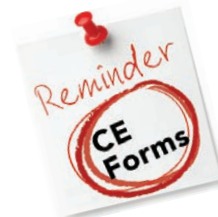
CE CREDIT REQUIREMENTS:

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

No partial credit will be given. Attendees must attend the full sessions to receive CE credit for that 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.

NO FORM - NO CREDIT - NO EXCEPTIONS



PROGRAM COMMITTEE



Thomas Casson



Paul Carnovale



Liz Peterson

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.

General Session Guest Speaker Biographies

KEYNOTE SPEAKER



**MORGAN
LUTTRELL**

Former Navy SEAL
Lieutenant & Former Sr. Advisor
**Veteran Relations with the Department
of Energy**

Morgan Luttrell is a 14-year military veteran with multiple deployments around the globe. Morgan Luttrell has made it his mission to assist veterans suffering from traumatic brain injuries (TBI's) post-traumatic stress syndrome, chronic pain and addiction in finding more effective treatments. The neuroscientist-in-training has drawn largely from his own experience with a TBI. Luttrell was aboard an army helicopter during a training exercise when their Black Hawk crashed; the force of the helicopter's explosion caused Luttrell to break his back in numerous places and sustain a severe traumatic brain injury that caused him multiple cognitive issues for months.

While recovering from his own injury, Luttrell signed up to take part in a clinical trial in which he underwent cognitive testing to learn how to improve his ability to process information. His journey through his own recovery led Luttrell to develop a keen interest in understanding the mechanics of the brain and in turn advance effective treatment protocols for other veterans that suffer from the side effects of TBI's and other related injuries. He completed his graduate degree in cognitive neuroscience and served as a Senior Advisor to the Secretary and Director for Translational Research and Applied Analytics in the Department of Energy. Through his work combining the DOE's technology with clinical data from the Department of Veterans Affairs and other agencies, Luttrell aims to use such partnerships to increase the quality of life for injured veterans in a shorter amount of time.

To maximize results, Luttrell has focused on principals from the military's Mission Success Philosophy. Luttrell's dedication to teamwork and collaboration has established him as an influential force across several industries. Discipline honed from his military experience combined with his dedication to using machine learning and artificial intelligence to compute complex data has led to the breakdown of silos, faster more precise statistical outcomes,

and the creation of cross-functional teams that have resulted in a greater impact for companies and causes.

Luttrell grew up on a Texas horse ranch with his twin brother, best-selling author, and Navy SEAL Marcus Luttrell. Luttrell's strong sense of duty at an early age developed into the desire to serve his country as a Navy SEAL. After graduating from Sam Houston State University with a degree in psychology and philosophy, Luttrell enlisted in the Navy, graduating BUD/s with class 237. After serving as a SEAL for seven years, Luttrell attended Officer Candidate School, after which he became a commissioned officer with Naval Special Warfare. While the transition from enlisted SEAL to officer was difficult, Luttrell met the challenge with honor and integrity. Throughout his tenure, he earned several awards, including two Sea Service Deployment Ribbons, two Good Conduct Medals, and an Operation Iraqi Freedom/Operation Enduring Freedom medal.

Luttrell retired in his 14th year of service with multiple deployments in support of the war on terror. After retirement, he went on to pursue an advanced degree in applied cognition and neuroscience at The University of Texas at Dallas and graduated with honors, which set a strong foundation for him to support his military brothers and first responders. He has served as the campaign director for the ReBoot Program, a veteran-assistance program providing a comprehensive and individualized approach to increasing the mental and physical well-being of America's military and first responding heroes. The program employs the expertise of the Center for Brain Health at the University of Texas at Dallas, where Luttrell has served as a research scientist after graduating.

In 2017, Luttrell received an appointment to the Department of Energy as senior advisor to the Secretary. He recently completed his executive education at Harvard University focused on professional leadership development. Luttrell resides in Texas with his wife and two sons.



MICHAEL T. VANNUCCI, CPA, CFE, CFF

Meaden & Moore

Prior to joining Meaden & Moore, LLP in 2003, Michael Vannucci began his career with the U.S. Department of Homeland Security. Since joining Meaden & Moore, Mr. Vannucci provides forensic accounting and specialized audit services, financial investigation services, litigation support and expert witness testimony, dispute resolution services, internal control review and assessment services, and bankruptcy estate services for the insurance and legal professions, corporations, and exempt organizations.

Mr. Vannucci is a Certified Public Accountant (CPA), a Certified Fraud Examiner (CFE), and is Certified in Financial Forensics (CFF). He oversees Meaden & Moore's West Coast operation out of California.



JEFFREY S. WEINSTEIN, Esq.

**Partner
Mound Cotton Wollan & Greengrass**

Jeffrey S. Weinstein has over thirty years of experience in insurance, reinsurance, commercial, tort, contract, corporate, and multi-district litigations and arbitrations. His practice is concentrated in domestic and international insurance coverage disputes involving first-party property and energy, and coverage issues arising from major CAT losses (e.g. 9/11, 2005 hurricanes, 2011 Japan Earthquake, Superstorm Sandy). Mr. Weinstein also assists clients in policy drafting, claims handling and litigation in connection with worldwide property and specialty coverages, such as "Kidnap, Ransom, Extortion," "Malicious Product Tampering," "Product Recall," "Contaminated Products," and "War Risks." He has litigated and handled appeals in state and federal courts throughout the United States and Puerto Rico and has participated in litigations involving several European countries.

Mr. Weinstein has lectured throughout the United States and in the U.K. on first-party coverage issues involving

environmental damages, product recall/contamination insurance, mold, and hurricane claims, and he has written for Best's Review, Mealey's Litigation Reports (Insurance), and The National Law Journal. In 2006 and 2018, Mr. Weinstein was a panelist at the Matson, Driscoll & Damico Annual Business Interruption Roundtable Panel Discussion in London. Mr. Weinstein is also a co-sponsor and participant in the New York Power Conference.

Mr. Weinstein is admitted to the New York and New Jersey State and Federal bars, the District Court of Wisconsin, and the United States Court of Appeals for the Second and Third Circuits.



**BILL
ERICKSON, Esq.**

Partner
Robins Kaplan LLP

Bill Erickson is a long-time presenter of the Property Case Update at Loss Executive Association conferences.

Bill has handled insurance and reinsurance coverage and measurement matters throughout the United States for more than twenty-five years. His high-profile assignments include the 9/11 World Trade Center appraisal; September 11 coverage litigation; the GTE Y2K claims and the 2011 Massachusetts tornado claims. In addition to his experience as a coverage attorney, Bill Erickson is an accomplished trial attorney and trial advocacy instructor.

Bill Erickson is the Chairman of the Insurance and Catastrophic Loss Group at Robins Kaplan LLP. In addition,



Bill is the Founder and Past President of the Massachusetts Insurance and Reinsurance Bar Association and a member of the association's Board of Directors. Bill is a frequent author on insurance topics and a long-time presenter at insurance industry and bar association conferences. In recognition of his more than twenty-five years as an accomplished practitioner, American Lawyer Media has named Bill a "Top Rated Lawyer" in Insurance Law.



**A. LIZ
BURNETT, Esq.**

Associate Attorney
Robins Kaplan LLP

Liz Burnett has litigated a variety of commercial insurance coverage disputes for industry leaders, including Factory Mutual Insurance Company, Affiliated FM Insurance Company, and Hartford Casualty Insurance Company. As a former claims' adjuster for Zurich North America and Berkshire-Hathaway-owned insurance boutique Applied Underwriters, Liz brings a depth of understanding and uniquely practical perspective to coverage matters.

In 2014, Liz second-chaired a federal jury trial for an insurer in *Cammeby's Management Company, LLC v. Affiliated FM Insurance Company*. The plaintiff sought \$30 million, plus interest, for losses caused by Superstorm Sandy and the insurer asserted a coverage limit of \$10 million. After an eight-day trial, the jury issued an advisory verdict affirming the \$10 million policy limit; this verdict was later confirmed by the court.

Liz also represents stakeholders in complex property damage and disaster litigation. Many of these high-stakes matters stem from fires and explosions caused by combustible dust and natural gas. In 2015, Liz and her team obtained summary judgment in an explosion case where the personal injury plaintiffs sought \$65 million in damages. In 2016, she represented a manufacturer following an explosion and fire that killed more than 30 people and injured dozens more at a natural gas refinery. Liz and her team secured a motion to dismiss the plaintiffs' claims with prejudice.



JAMES KITCES

Partner
Robins Kaplan LLP

James Kitces is a Partner with Robins Kaplan LLP in the Insurance and Catastrophic Loss Group where he represents insurers in connection with catastrophic events with an emphasis in the southeast. James spent 17 years in Atlanta before moving to Boston. James helps clients manage and control risks associated with complex first-party commercial property and third-party insurance claims and litigation. He has handled complex, multi-million dollar matters across the country including building collapses, tornadoes, hurricanes, floods, fire, design defect, explosions, and other events. He also helps his clients efficiently resolve disputes in appraisal, reference, and arbitration. James also represents insurers in industrial subrogation matters and in inspection and product liability cases.

James has litigated in state and federal courts throughout the country as lead counsel on large, complex disputes. Before joining Robins Kaplan LLP, James focused on insurance-reinsurance dispute resolution at a national law firm and he had the privilege of representing the State of Georgia as an Assistant Attorney General in courts throughout the state.



BILL WEBSTER, Esq.

Partner
Robins Kaplan LLP

Bill Webster is a partner and a leader in Robins Kaplan LLP's Insurance and Catastrophic Loss Litigation Group. Mr. Webster's practice focuses on commercial property and energy and engineered risks, including coverage analysis and subrogation, dispute resolution, strategic advice, and trial and arbitration work arising from all types of perils and involving a multitude of risks under all risks, named perils, and builders' risk policies. He has litigated in state and federal court throughout the United States as lead counsel on multi-million-dollar, complex disputes.

Mr. Webster's clients recognize his experience in energy and infrastructure industry claims involving power generation facilities, wind and solar facilities, oil and gas refining, processing, and transport, including pipelines, supply chain interruption and time element issues, underground mines, and construction defects.

WORKSHOP 1



DAN STEED

Manager, London Operations
Engle Martin & Associates

Dan represents Engle Martin & Associates in London providing oversight across the full range of Engle Martin lines of business including both field and TPA operations. Dan joined the market in 2006. He previously worked for two different Lloyd's brokers, RKHarrison and Lockton, for 6 years in predominantly North American property claims and more recently McLarens for a further six years with a particular Florida influence.

Dan was presented with the Florida Commercial Claims Management Service Provider of the Year award in 2019 in the wake of the catastrophic 2017 hurricane season and chaired the Lloyd's Under 30's group for three years until 2019.



LOUISA CHISHOLM

Senior Claims Specialist
Liberty Specialty Markets

Louisa started off her claims career within Lloyd's of London ten years ago by working as a claims adjuster at Xchanging where she handled a wide range of Non-Marine claims on behalf of a variety of Lloyd's of London syndicates. Eight years ago, Louisa joined Liberty Specialty Markets. She is now a Senior Claims Specialist handling large Energy, Property and Construction risks worldwide.

Louisa is an active member of the Property Insurance Claims Group (PICG) and has previously been a committee member of the Women in Claims London group.



KRISTIN CUMMINGS

Partner
Zelle, LLP

Kristin Cummings is a partner in the Dallas office of Zelle, LLP. Her practice is devoted to representing clients in a wide range of insurance-related issues in both first-party and third-party disputes. She counsels and represents clients in litigation matters in state and federal courts across the country and has significant experience in the areas of commercial property, energy, builder's risk, general liability, errors and omissions, professional liability, workers' compensation and construction defects.



SAMANTHA A. FLAX

COO and Co-Founder
Flax & Associates

As Co-Founder and COO of Flax & Associates, Samantha is responsible for all day-to-day operations, administration, human resources, marketing and business development for the firm. Her background and professional experience brings a unique skillset to the organization and Samantha's responsibilities extend to fostering client relationships and using her background in law and insurance to facilitate and nurture the growth of Flax & Associates.





CHRISTINE RENELLA

Senior Associate
Zelle, LLP

Christine Renella is a Senior Associate in the Miami office of Zelle, LLP. Her practice focuses on complex insurance coverage disputes, bad faith litigation, and commercial litigation matters in state and federal courts throughout Florida. Christine has handled matters involving property insurance policies, builder's risk coverage, jewelers' block coverage and a variety of complex commercial litigation matters. Poised to handle various CAT losses, Christine is licensed to practice in Florida and Texas.

WORKSHOP 2



AUBREY SHEA

Vice President
J.S. Held

Based out of the J.S. Held Philadelphia, PA office, Aubrey Shea has more than 10 years of forensic accounting experience in quantifying claims related to builders' risk and soft costs, construction defects, physical damage, stock and contents, business interruption, extra expenses, theft, and personal injury. She has worked extensively on projects related to floods, hurricanes, and wildfires. She has also provided litigation support on numerous occasions and delivered expert assistance for depositions and mediations.

Her passion for understanding each assignment and determining the proper valuation is evident in the seminars she has presented on topics related to business interruption, property damage, and financial issues arising after catastrophes. Aubrey utilizes her expertise to address complex financial matters spanning a variety of industries including healthcare, education, construction, manufacturing, gaming, hospitality, retail, marine, and energy.

Aubrey is a graduate of West Virginia University and holds a Bachelor of Science degree in accounting and a minor in communications.



MARK ANDREWS

Associate Principal
Thornton Tomasetti

Mark Andrews has more than 12 years of experience in structural and forensic investigations, condition and damage assessments, renovations, emergency response, litigation support, and property loss consulting. His expertise includes reinforced concrete, steel, masonry, wood, cast iron, and other modern and historic construction materials.

Mark specializes in structural investigations of collapses, general failures, fire losses, construction issues and damage caused by severe weather, as well as analysis of code-related structural issues. He leads multidisciplinary teams for post-CAT investigations for a variety of natural and man-made events. Mark's experience includes responses to Hurricanes Michael, Florence, Irma, and Maria; CAT-90 Sandy and Tropical Storm Irene, both in the greater New York City area and post-earthquake and post-tornado structural evaluations.

Mark's experience also includes renovation and restoration of historic, commercial, cultural, hospitality and mission-critical facilities. Notable work includes structural analysis and design for several upgrades to the Empire State Building's office, broadcasting, and tourist facilities. He is also experienced in the façade assessment and remedial design services required for New York's FISP (formerly Local Law 11) program.

Mark is a licensed professional engineer in New York, New Jersey, and Florida. He holds a bachelor's and master's degrees in civil engineering from Rensselaer Polytechnic Institute in Troy, New York.





MAUREEN S. MYRE

Claim Manager
AXA XL

Maureen is currently a Claim Manager for EPC Claims, North America at AXA XL. She is responsible for managing a unit of examiners that handle property, equipment breakdown and construction/builder's risk claims for risks written out of the US.

Maureen began her career in 1986 as a Multi-line Claim Representative with Great American Insurance. She has held positions with several major carriers in both technical and supervisory roles, handling both property and liability claims. Maureen has handled claims for virtually all property lines of business, including equipment breakdown, marine and inland marine, general property for all sizes of risks, energy and renewable energy and construction and engineering. Most recently, Maureen worked for Royal and SunAlliance handling incoming reserve flow claims and with Swiss Re handling Energy and Construction and Engineering claims. She has also served as a Claims Trainer, teaching both technical and soft skills including customer service skills for claims adjusters and presentation skills.

Maureen has an undergraduate degree in Business Administration with a concentration in Property Casualty Insurance from The College of Insurance in NY, now part of St. John's University. She holds a NY General Adjuster License and also holds adjuster licenses in CT, DE, FL, KY, LA, NC, NH, NM, RI, SC, TX, VT, WV and WY.



MICHELLE T. PERTESIS

Vice President/Executive General Adjuster
McLarens

Michele T. Pertesis is currently a Vice President/Executive General Adjuster with McLarens.

Michele began her insurance career in Florida as an adjuster with State Farm Insurance. After experiencing Hurricane Andrew, she transitioned into their National Catastrophe Team as a Claim Manager. She managed their Cat response for various natural disasters as well as supervised a team of Cat Adjusters.

Michele moved to New York City in 2001 and joined Crawford and Company. She spent 10 years with Crawford with a short break with the Property Claims Service (PCS), division of the Insurance Services Office. At PCS, she worked with the insurance industry designating catastrophe events for the industry and compiling and reporting estimates of insured property losses resulting from catastrophes. She also spent time at Royal & Sun Alliance handling reverse flow property claims.

Michele made the move to McLarens in 2015.

Michele is a native of New York though grew up in Florida. She holds a Bachelor of Arts degree in Business Administration. She is a member and past President of the New York Chapter of the National Association of Insurance Women. She holds a CPCU designation. She has been an Associate Member of the LEA for the past 10 years.



WORKSHOP 3



LIZ PETERSON

Managing Director, UK
Envista Forensics

Ms. Peterson is responsible for the development, management and growth of forensic services for the EMEA region, with oversight of the Major Loss, Middle Market, and Cyber teams.

Ms. Peterson recently served as a Managing Director of Douglas G. Peterson & Associates (DGPA). In that capacity, she oversaw several key initiatives including orchestrating a significant financial return for the company; enacting transformational change, turning to open book management and creating a collaborative and participatory environment. In addition, she also led a firm-wide review of budgets designed to enhance financial performance; negotiated Professional Service Agreements; provided a platform focused on business development opportunities as well as facilitating industry-wide events such as the NY PowerCon.

Liz began her career at DGPA in 2008 by establishing and leading her firm's New York City office. While there, Liz recruited and developed the professional staff, expanded both the local engineering capability and capacity, enhanced corporate relationships and positioned the firm to support client needs during Superstorm Sandy.

Throughout her tenure, Ms. Peterson has managed engineering efforts on first and third-party complex insurance claims ranging from \$20K to over \$600 million in exposure values, involving a wide variety of engineering disciplines. She has managed over 500 middle market files as well as provided direction and strategic advice to clients on a number of high-profile losses including Kinder Morgan's New York Metro Tank Yard facilities, Duke Energy's wind farms, and the Coney Island amusement park, among others.

Ms. Peterson is an accredited LEED AP BD+C and Green Globes professional. She received her B.A. from New York University and is an active member of the Loss Executives Association, the Property Loss Research Bureau's Tech Savvy Committee, the Honorable Order of the Blue Goose International, and Founded the Blue Goose Youth Group.



JEAN L. BRODERICK, ARE

Regional Practice Leader
Energy, Property & Construction Claims – NA
XL Catlin - AXA XL, a division of AXA

Jean L. Broderick is currently a Regional Practice Leader for Energy, Property & Construction Claims – North America for AXA XL.

Jean began her career as a Loss Prevention Engineer with FM Global. She then moved into Claims as a field adjuster holding Senior and General Adjuster positions in both the New York and Boston Operations offices and then became the Branch Claims Manager of the Norwalk, CT office. In 2007, Jean joined XL Reinsurance America as the lead for all large property reinsurance claims. In addition to her responsibilities as the property lead, Jean also handled liability and workers' compensation claims. In October 2013, Jean transitioned into the role of Claims Manager for North America Property at AXA XL and in September 2015 became a Regional Practice Leader for Energy, Property & Construction Claims – North America.

Jean is a native of Yonkers, New York and holds a BE in Chemical Engineering from Manhattan College, Riverdale, NY. She holds the Associate in Reinsurance (ARE) designation and is currently working toward the CPCU designation. Jean is a member of the Loss Executives Association (LEA) and is the Immediate Past President of the LEA.



STEVE CERSINE

Director of Property Claims
Allianz Global Corporate & Specialty (AGCS)

Stephen Cersine is the Director of Property Claims for Allianz Global Corporate & Specialty Insurance. In his current role, he manages a team handling domestic and international commercial property, builder's risk, construction and engineering claims.

Stephen started his career with Zurich North America as a global associate in claims and quickly progressed into handling global energy claims in New York. Subsequently, he handled claims for some of Zurich's largest customers as the AVP - International Property Claims in Schaumburg, IL.

Stephen holds a Juris Doctor from Hamline University School of Law and a Global Masters in Business Administration from Thunderbird School of Global Management.



MARK EWING

Practice Leader, Major Loss
Envista Forensics

Mark Ewing is an electrical engineer with over 27 years of experience investigating electrical incidents and equipment failures, determining origin and cause, scope of damage, and valuation of equipment. He has extensive experience performing large scale electronic restoration and emergency response in high-technology catastrophe losses across the marine, medical and manufacturing/ industrial industries. Mr. Ewing's expertise has been utilized in preparing hundreds of reports and providing consulting expertise in numerous litigated matters. As a published author, Mark has had articles published in leading industry magazines as well as frequently presenting at industry conferences and seminars. Mr. Ewing provides failure analyses in electronic equipment damages and determines cost of repair or replacement in insurance claims and litigation cases.



MARGUERITE HART, CPA, CFE

Partner
MDD Forensics

Marguerite is a Partner in the Pittsburgh office and specializes in applying forensic accounting techniques for damage analysis and valuations. An accountant for over 25 years, she focuses on the quantification of damages resulting from lost profits, business interruption, fidelity claims, fraud and investigation, liability losses, personal injury and wrongful death. In addition, she has been active in the area of catastrophe services.

Marguerite works on complex losses throughout the U.S. as well as internationally, across a wide range of industries such as automotive, bio-fuels, hospitality, manufacturing, maritime, medical, mining, oil and gas, power generation, professional services, steel, and technology.

She serves as a consultant for litigation matters and has been recognized as an expert in state and federal courts as well as alternative dispute settings. She works extensively with counsel through all phases of the litigation process, from discovery through expert testimony.

Marguerite is a dual national (France and U.S.), fluent in French and English and has a working knowledge of Spanish.



DESMOND SULLIVAN

President
Lloyd Warwick International, NY

Desmond Sullivan is the President of Lloyd Warwick International, New York. He has over 40 years' experience in dealing with large industrial, commercial and energy losses across the globe. During that time, Des has worked in offices in Jamaica, Singapore and Los Angeles and has managed offices in London, Thailand and New York. Desmond has been based in New York since 1997.

Des handles mainly energy claims particularly in the power gen and renewable sectors. He has also been responsible for the management of numerous national and global accounts and this has, in turn, led him to being involved in cyber losses for international Insureds in the last three years. He has acquired extensive CAT experience from hurricanes Floyd, Ike, Georges, Rita, Wilma, Katrina, Irene, Sandy, Harvey and Maria. At the time of 9/11, he was the Managing Director of the New York office of an international adjuster.

Des has participated in training and mentoring of young insurance professionals. He is a Fellow of the Chartered Insurance Institute and a Fellow of the Chartered Institute of Loss Adjusters. He is a volunteer for the American Red Cross and is married with one daughter.





WORKSHOP 4



**DANIEL
TRENKEL**

Claims Manager
W/R/B Underwriting

Daniel Trenkel has 18 years experience in the London Market. He has experience dealing with major complex losses in Property and Construction All Risks as well as some other first-party classes of business.

Daniel spent 13 years with QBE before joining W/R/B Underwriting in 2015 where he is a Claims Manager.



**JAMIE
DAVY**

Senior Claims Adjuster
Cathedral Underwriting Ltd.

Jamie Davy joined Cathedral in July 2016 and now is responsible for managing the International Direct & Facultative Property and Treaty losses for Syndicate 2010. Jamie is a graduate of the Lloyd's Claims Program, during which time he was seconded to Willis, Crawford, Clyde & Co, The Corporation of Lloyd's and Xchanging. Upon graduation, Jamie joined QBE where he spent four years as a Property Claims Adjuster.



**ISAAC
FRANKS**

Senior Claims Specialist,
Energy, Property, Construction
AXA XL

Isaac Franks is a Senior Claims Specialist at AXA XL. He is based in their New York office and specializes in energy, property and construction claims in the US. Isaac joined AXA XL (at the time Catlin Syndicate) in 2014 working in the London office in North American Property and transferred to New York in 2017. Before joining Catlin, Isaac worked as a Claims Broker at a Lloyd's Broker.



OWEN LUDBROOK

Director of Client Services, London
**Sedgwick Claims Management Services
Ltd. (Sedgwick)**

Owen has 14 years experience in the Insurance Industry and joined York (now Sedgwick) in February of 2017. Owen began his career working for the Lloyd's Broker THB in their North American Division before a move to the Lloyd's Managing Agent QBE where he latterly headed up the Property Binder claims team. Owen is a former Chair of the LMA LIIBA U35 Claims Group.



LOUISE VAN DER VALK

Claims Manager
THB Group Ltd.

Louise joined THB in 2007 and as Claims Manager is responsible for overseeing the direct and facultative losses emanating from the Worldwide Property Division. Louise has handled many large complex Open Market, Binding Authority and Reinsurance losses in various territories including North America, Latin America, Caribbean, United Arab Emirates as well as Mining losses in Poland.

Louise was previously Chairperson of the LMA LIIBA U35 Claims Committee.

WORKSHOP 5



SAMUEL H. RUBY, ESQ.

Insurance Law Practice Group Leader
Bullivant Houser Bailey PC

Sam Ruby is the leader of Bullivant's Insurance Law Group and the shareholder-in-charge of its San Francisco office. For over twenty years, Sam has advised insurers in property, liability, and marine insurance claims. Insurers turn to Sam not only for coverage analysis but also for practical advice

for resolving difficult claims. Unfortunately, resolution sometimes requires litigation, and Sam has defended insurers in multi-million-dollar lawsuits for declaratory relief, breach of contract, and bad faith.

With much of his practice focused on property claims, Sam has assisted insurers with large fire, water damage, mold, earth movement, electrical disturbance, construction defect, business interruption, and bad faith claims. He frequently advises and represents insurers in connection with claims presented by public entities and sovereign Native American tribes. Sam has also been coordinating counsel to insurers on claims arising out of California wildfires and mudslides and he is national coordinating counsel to an insurer on claims potentially implicating Additional Collapse Coverage.

In the builder's risk arena, Sam has advised and represented domestic and London-based underwriters regarding large private and public projects along the West Coast, including hotels, apartment buildings, hospitals, highway improvements, and airport expansions/renovations. He has been consulted by underwriters regarding policy form revisions.

Sam is an Associate member of the Loss Executives Association and a delegate to the annual conference of the Property Insurance Claims Group (PICG), a Lloyd's Market Association committee.



JOHN ROBERTS

Vice President
Specialty Energy & Construction Claims
AIG

After graduating in civil engineer from Manchester University, John Roberts worked for a number of contractors and consulting engineers ultimately qualifying as a chartered civil and structural engineer. After 10 years, he moved into the Insurance industry as a Chartered Loss Adjuster in the UK, transferring to Argentina with an international firm of Loss adjusters where he was country president for 6 years. In 2004, John moved to the USA with an adjusting company. For the last 13 years, John has been a Vice President of Claims for AIG specializing in Energy and Construction.



GRANGER STUCK

Executive Vice President,
Building Construction Practice Lead
J.S. Held

Granger A. Stuck's career has spans 28 years as a construction industry professional, with more than \$2.1 billion and 6.8 million square feet in successful construction projects for two of the nation's top contractors, Clark Construction Company and M. A. Mortenson Company.

Since 2009, Granger has worked on numerous consulting projects and disputes involving delay claims, cost claims, and other construction related disputes. Granger's work consists primarily of providing schedule analysis to determine project delay, analysis and estimating of costs and litigation support. His considerable experience also includes International claim work in New Zealand, Australia, and Thailand.

WORKSHOP 6



CHESTER WARZYNSKI

Principal Consultant
Warzynski Consulting Services

Chet Warzynski is a leadership and organizational development consultant specializing in strengthening performance in universities, hospitals, Fortune 500 companies, and SME's. He provides management consulting services in leadership and supervisory development, executive assessment and coaching, strategic planning, team building, project management, and technology transfer and innovation.

Chet has held a variety of management and executive level positions in the public sectors and private sectors, including, Senior Advisor to the Chief Financial Officer at Carnegie Mellon University where his role was to facilitate the development of a strategic plan and portfolio of innovative projects to support the financial goals of the university.

Prior to his work at Carnegie Mellon, Chet was Executive Director of Organizational Development at the Georgia Institute of Technology and taught leadership in the School of Public Policy. He also taught organizational development in the School of Industrial and Labor Relations and leadership in the Johnson Graduate School of Management at Cornell University and served as director of organizational development services for the University.

In the private sector, Chet held the position as Director of Planning & New Venture Development for Dow Jones, Inc. and was Director of Education & Training for Mercy Hospital in Miami, Florida and St. Joseph's Hospital in London, Ontario.

Chet completed his undergraduate and graduate studies in sociology at Southern Illinois University and the University of Western Ontario, and completed his post-graduate and doctoral work in educational planning at the University of Toronto.

Chet has been published on a broad range of management topics including leadership, strategic planning, organizational development, reengineering, project management, and sustainability. He has served on several Boards, including the National Consortium for Continuous Improvement in Higher Education. His current research is on technology transfer and innovation.







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