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J.S. Held LLC

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The Beaumont Group, Inc.

**WEB SUPPORT**

Maria (Gaby) Suliman 201-569-3346  
Edward R. Reilly & Co., Inc.

April 3, 2023

Dear LEA Members and Guests,

On behalf of the LEA Board of Directors, it is my pleasure to invite you to the LEA's Spring Meeting and Educational Conference being held at the Newport Marriott Hotel, 25 America's Cup Avenue, Newport, RI, June 14-16, 2023.

Don't miss this opportunity to catch up with your fellow members from all over North America, Latin America and the U.K. and obtain interesting educational content along with Continuing Education credits.

We begin on Wednesday the 14th with our annual LEA golf outing at the Newport National Golf Club in close proximity to the hotel. Later in the evening will be a welcome reception at the Marriott Hotel.

On Thursday morning, the General Session includes three keynote topics. First, we have Dr. Louis Gritzo, VP Research, FM Global presenting "***Infrastructure: Understanding the Risk, Assessing the Loss and Analyzing Coverage Issues***". Next, Lela Patrick, FCAS, MAAA, PWC, presenting "***Actuarial Science, Going Beyond the Pocket Protector***". To close the General Session will be Brandon Sipple and Jerimiah O'Leary with The Law Firm of Finazzo, Cossolini, O'Leary Meola & Hager and James Preston from Liberty Mutual to present the "***Property Case Law Update***".

Thursday afternoon and Friday morning, we are providing a choice of three separate two-hour workshops followed by a choice of three separate one-hour sessions, all of which qualify for Continuing Education credits.

The topics for the two-hour sessions are ***Technology in a Rapidly Changing Claims World; Policy Challenges, Inter-Insurer Interactions, and Effective Claim Handling in the Market Environment; Decoding BI Terminology-Speaking the Same Language-Understanding What BI Terms Mean to all sides of a Claim.***

The one-hour session topics are: ***Electrical Losses Involving Batteries; Risk Analysis for Contested Claims-The Importance of How and Where; Fostering and Empowering the Insurance Industry to Attract and retain New and Diverse Talent.***

These presentations will provide a balanced and informative program which we hope you will find entertaining and educational.

We are extremely pleased to return to the Newport Marriott, one of the LEA members favorite locations. You will find that it is a great value, so take advantage of the LEA hotel rate by booking online. I look forward to seeing everyone again for another successful LEA Conference. Register early as we anticipate keen interest in this June event.

Best Regards,

Raymond Mattia  
LEA President

***"Quality Education for the Property Claim Professional Since 1931"***

Mailing Address: Loss Executives Association, P.O. Box 37, Tenafly, NJ 07670

Website: [www.lossexecutives.com](http://www.lossexecutives.com)

# *MEETING & HOTEL RESERVATIONS*

*LEA's Website:*

[www.lossexecutives.com](http://www.lossexecutives.com)

*User Name: Your Email Address*

*Password: Changeme! (unless you've changed it)*

**LEA has negotiated a special group rate of \$309.00 for meeting attendees. Please understand that rooms reserved for the LEA at the group rate are limited and will be processed on a first come first served system.**

**Payment by Credit Card - PLEASE READ THIS:**

**Once you've registered online for the meeting, on your registration confirmation page you will find the link to make your room reservation at The Newport Marriott. YOU MUST MAKE YOUR RESERVATION NOW, if you don't we can't guarantee your room rate.**

**Payment by Check - PLEASE READ THIS:**

**Registrations completed online choosing check payment will not be processed until payment is received. Payment must be received within 7 business days of registering. Upon receipt of payment, an email containing the link needed to reserve your guest room will be sent to you.**



*Golf Outing*  
*Newport National Golf Club*



*Wednesday, June 14, 2023*  
*8:00 am Sharp*

*\$200 per player*

- Shamle – teams will be paired equitably
- Play in 4.5 hours

Name: \_\_\_\_\_ Hdcp or Avg. Score: \_\_\_\_\_

*Additional details to golf registrants will be emailed closer to the date of the meeting.*



**Loss Executive Association**  
PO Box 37  
Tenafly, NJ 07670  
Phone: 201-569-3346  
Email: [info@lossexecutives.com](mailto:info@lossexecutives.com)

## **88th SPRING EDUCATIONAL CONFERENCE**

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

**June 14 – 16, 2023**

### **Wednesday, June 14, 2023**

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

### **Thursday, January 15, 2023**

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

<b>8:50 – 9:00 am</b>	<p><b>Program Overview</b>  Steve Yeo, Group Head of Claims  <i>Lancashire Insurance Group</i></p>
<b>9:00 –10:00 am</b>	<p><b>Infrastructure: Understanding the Risk, Assessing the Loss and Analyzing Coverage Issues</b>  <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>
<b>Speaker</b>	<p>Dr. Louis Gritzko, Vice President, Research  <i>FM Global</i></p>
<b>10:00 – 10:15 am</b>	<b>Refreshment Break</b>
<b>10:15 – 11:15 am</b>	<b>Introduction of Guest Speaker</b>
<b>Topic</b>	<b>Actuarial Science: Going Beyond the Pocket Protector</b>
<b>Speaker</b>	<p>Lela Patrik, FCAS, MAAA, Actuarial Principle  <i>PricewaterhouseCoopers (PwC)</i></p>
<b>11:15 – 12:15 pm</b>	<p><b>Property Case Law Update</b>  <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>
<b>Moderator</b>	<p>James Preston, Senior Property Examiner  <i>Liberty Mutual Insurance</i></p>
<b>Speakers</b>	<p>Jeremiah O’Leary, Partner  <i>Finazzo Cossolini O’Leary Meola &amp; Hager LLP</i></p> <p>Brandon Sipple, Partner  <i>Finazzo Cossolini O’Leary Meola &amp; Hager LLP</i></p>
<b>12:15 – 1:30 pm</b>	<p><b>Lunch</b>  <i>(Open to all registered attendees)</i></p>
<b>1:30 – 3:30 pm</b>	<p><b>Concurrent Workshops</b>  <b>2-Hour Sessions (Select One)</b>  <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](http://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



## LEA Board of Directors

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*AIG*

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#### CE Coordinator

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

#### Meeting Coordinator/Event Planner

Maria Sclafani, *The Beaumont Group, Inc.*

4.26.23

# WORKSHOP & EXECUTIVE FORUM REGISTRATION FORM

June 14 - 16, 2023

To assist us in determining Executive Forum and workshop space requirements, please indicate the sessions that you intend to attend.

I plan to attend: \_\_\_\_\_ (name)

WORKSHOP TITLE	Thursday PM (6/15)	Friday AM (6/16)
----------------	-----------------------	---------------------

*Select One for Each Day*

## 2 Hour Sessions

# 1 - "Technology in a Rapidly Changing Claims World"

\_\_\_\_\_

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

\_\_\_\_\_

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

\_\_\_\_\_

*Select One for Each Day*

## 1 Hour Session

# 4 - "Electrical Losses Involving Batteries"

\_\_\_\_\_

# 5 - "Risk Analysis for Contested Claims: The Importance of How and Where"

\_\_\_\_\_

# 6 - "Fostering and Empowering the Insurance Industry to Attract & Retain New and Diverse Talent"

\_\_\_\_\_

**PLEASE COMPLETE THIS FORM, ALONG WITH YOUR MEETING REGISTRATION FORM, and submit via email or via USPS if registering by mail.**

\_\_\_\_\_  
(Your name - printed)

**92<sup>nd</sup> SPRING MEETING & EDUCATIONAL CONFERENCE**  
**JUNE 14 - 16, 2023**  
**THE NEWPORT MARRIOTT**  
**NEWPORT, RHODE ISLAND**

**REGULAR MEMBERS REGISTRATION FORM**

**REGISTRATION FEE:**      Members: \$260.00      Spouse: \$280.00  
**INCLUDES:** Coffee Breaks, Wednesday Evening Reception, Thursday Lunch and Gala Reception

**\*\*\*IMPORTANT INFORMATION\*\*\***

Attendance at L.E.A. meetings is restricted to members in good standing, their spouses and guests of members (not to exceed two per attending member). Guests must also otherwise qualify as a Regular or Associate member.

**\* \* \* NO REFUNDS AFTER JUNE 2, 2023 \* \* \***  
**(Registration will not be accepted after June 5, 2023)**

Enclosed is my check for (Payable to LEA): \$ \_\_\_\_\_

ARE YOU ATTENDING THE WEDNESDAY WELCOME RECEPTION? \_\_\_\_\_ Yes \_\_\_\_\_ No

ARE YOU ATTENDING THE THURSDAY GALA RECEPTION? \_\_\_\_\_ Yes \_\_\_\_\_ No

NAME: \_\_\_\_\_

COMPANY: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY/STATE: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_

**NAME TAG DESIGNATION:**

\_\_\_\_\_ Last                                      \_\_\_\_\_ First                                      \_\_\_\_\_ Spouse First Name

Mail to:      Loss Executives Association  
C/O Edward R. Reilly & Co., Inc.  
580 Sylvan Avenue – Suite 1K  
Englewood Cliffs, NJ 07632  
Telephone: 201-569-3346  
Fax: 201-569-6826  
msuliman@reillyandco.com

**\*\*\*Hotel Accommodations\*\*\* - Cut-Off Date: May 10, 2023**

LEA has negotiated a special group rate of \$309.00 for meeting attendees. Please understand that rooms reserved for the LEA at the group rate are limited and will be processed on a first come first served.

**REGISTER ONLINE** with a credit card at [www.lossexecutives.com](http://www.lossexecutives.com) – Once Registered for the conference on the confirmation page you will find the link to your reservation at the Newport Marriott to make your room reservations. **YOU MUST MAKE YOUR RESERVATION NOW**, if you don't, we can't guarantee your room rate.

**REGISTER BY MAIL WITH A CHECK** with a Check – Check payment will not be processed until payment is received. Payment must be received within 7 business days of registering. Upon receipt of payment, an email containing the link needed to reserve your guest room will be sent to you.

**\*\*\*Registration Desk\*\*\***

Opens at 11:00 AM on June 14, 2023 for L.E.A. members and guests. Any questions concerning the hotel, contact Maria Sclafani at (718) 892-0228; e-mail: [mcs@thebeaumontgroup.com](mailto:mcs@thebeaumontgroup.com)

92<sup>nd</sup> SPRING MEETING & EDUCATIONAL CONFERENCE

JUNE 14 - 16, 2023

THE NEWPORT MARRIOTT  
NEWPORT, RHODE ISLAND

GUEST REGISTRATION FORM

REGISTRATION FEE: Members: \$850.00 Spouse: \$280.00

INCLUDES: Coffee Breaks, Wednesday Evening Reception, Thursday Lunch and Gala Reception

\*\*\*IMPORTANT INFORMATION\*\*\*

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ARE YOU ATTENDING THE THURSDAY GALA RECEPTION? \_\_\_\_\_ Yes \_\_\_\_\_ No

NAME:

\_\_\_\_\_

COMPANY:

\_\_\_\_\_

ADDRESS:

\_\_\_\_\_

CITY/STATE:

\_\_\_\_\_

TELEPHONE:

\_\_\_\_\_

NAME TAG DESIGNATION:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Mail to:

Loss Executives Association  
C/O Edward R. Reilly & Co., Inc.  
580 Sylvan Avenue – Suite 1K  
Englewood Cliffs, NJ 07632  
Telephone: 201-569-3346  
Fax: 201-569-6826  
msuliman@reillyandco.com

\*\*\*Hotel Accommodations\*\*\* - Cut-Off Date: May 10, 2023

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