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J.S. Held Inc.

##### **MEETING COORDINATOR**

Maria Sciafani 718-892-0228  
The Beaumont Group, Inc.

October 16, 2019

Dear LEA Member and Guests,

On behalf of the LEA Board of Directors, it is my pleasure to welcome you to the LEA's 89<sup>th</sup> Annual Educational Conference at the Ft. Lauderdale Marriott Harbor Beach Resort in Ft. Lauderdale, FL.

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 General Session includes three segments, the first is motivational speaker, Morgan Luttrell, Former Navy Seal Lieutenant & Former Senior Advisor of Veteran Relations with the Department of Energy, the second is on Bitcoin and the third is the Property Law Case Update. All of these topics should prove to be very interesting, informative and generate discussion amongst the audience.

The workshops include a variety of topics such as Assignment of Benefits, Early & Combined Involvement of the Adjustment Team: Controlling the Course and the Costs of Major Losses, The Price of Modern Technology, The Lloyd's Market – A Look at Life Inside the Square Mile, Recurring Issues in Builder's Risk Claims, and Moral Purpose and Organizational Resilience. These presentations will provide a balanced and informative program which we hope you will find entertaining and educational.

As a gentle reminder, for those attendees requiring Continuing Education credits, please remember that 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 or have missing license numbers.

In addition, by attending the LEA session you consent that your picture may be in one of the wonderful 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. If you do not wish your photo to be taken, simply tell our roving photographer and she will be more than happy to accommodate your request.

We are extremely pleased to be returning to Ft. Lauderdale and look forward to an educational and successful meeting.

Best Regards,

*Paul Aviles*  
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 \$334.00 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, you will be AUTOMATICALLY directed to the Fort Lauderdale Marriott Harbor Beach Resort & Spa to make your room reservations, Marriott's procedures have changed and there will not be a link forwarded as there was last year. 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.**



*Rod Birmingham Memorial  
Golf Tournament 2020*

*Jacaranda Golf Club  
Plantation, Florida*



*Wednesday, January 15, 2020*

*8:30 a.m.*

*\$165 per player*

- Shamble – teams will be paired equitably
- Lunch provided
- Awards Banquet Following Play
- Play in 4.5 hours

*Deadline to Register - January 10, 2020*

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

*Additional details to golf registrants will be emailed.*



Loss Executives Association  
P.O. Box 37 ♦ Tenaflly, NJ 07670 ♦ Phone: 201-569-3346  
Email: [info@lossexecutives.com](mailto:info@lossexecutives.com)

**2020 ANNUAL MEETING & EDUCATIONAL CONFERENCE**

Fort Lauderdale Marriott Harbor Beach Resort, Fort Lauderdale, FL

**January 15 – January 17, 2020**

**Wednesday, January 15, 2020**

<b>8:00 – 5:00 pm</b>	<b>Registration Opens</b>
<b>8:00 – 5:00 pm</b>	<b>Speaker Ready Room Available</b>
<b>8:30 am</b>	<b>Rod Birmingham Memorial Golf Outing</b> Jacaranda Golf Club 9200 West Broward Boulevard Plantation, FL 33324
<b>5:30 – 7:30 pm</b>	<b>Opening Night Reception</b> ( <i>Open to All Registered Attendees</i> )

**Thursday, January 16, 2020**

<b>7:30 – 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>8:00 – 8:45 am</b>	<b>General Session/Members Meeting</b>
<b>8:00 – 8:05 am</b>	<b>Welcome/Anti-Trust</b> Costantino Suriano, Esq., Partner <i>Mound Cotton Wollan &amp; Greengrass</i>
<b>8:05 – 8:15 am</b>	<b>Opening Remarks &amp; Introduction of New President</b> Paul Aviles – LEA President Senior Vice President <i>Allied World Assurance Company</i>
<b>8:20 – 8:25 am</b>	<b>Treasurer's Report/Golf Report</b> Thomas D. Casson, AG Commercial Property and Energy Property Claims Field Group Lead <i>AIG</i>
<b>8:30 – 8:35 am</b>	<b>Membership Report</b> Margaret A. (Peggy) Reilly <i>Edward R. Reilly &amp; Co., Inc.</i>
<b>8:40 – 8:45 am</b>	<b>Continuing Education Report</b> Louis D. Magnan, CPA <i>JS Held</i>

**8:45 – 9:00 am**

**Program Overview & Introduction of Keynote Speaker**

Paul Aviles, Senior Vice President & LEA 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, 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.*

**10:00 – 10:15 am**

**Refreshment Break**

**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. The program is designed as an interactive workshop that will introduce the concepts, their use and relevance, as well as potential benefits and risks in hopes to promote meaningful and engaging discussion.*

**Speakers**

Michael T. Vannucci, CPA, CFE, CFF  
*Meaden & Moore*

Jeff Weinstein, 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 Kalan 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, Bill, James and Liz for a fast-paced combination of audience participating and case discussion covering the recent cases and trends you need to know.*

<b>Moderator</b>	Bill Erickson, Esq., Partner <i>Robins Kaplan LLP</i>
<b>Participants</b>	Liz Burnett <i>Robins Kaplan LLP</i>  James Kitces, Partner <i>Robins Kaplan LLP</i>  Bill Webster, Partner <i>Robins Kaplan LLP</i>
<b>12:15 – 1:30 pm</b>	<b>Lunch</b> ( <i>Open to all registered attendees</i> )
<b>LEA Concurrent Workshops</b>	<b>2 Hour Sessions</b>
<b>1:30 – 3:30 pm</b> <b>Workshop 1</b> (2 Hours)	<b>Select One</b> <b>Assignment of Benefits</b> <i>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.</i>
<b>Moderator</b>	Christine Renella, Senior Associate <i>Zelle, LLP</i>
<b>Participants</b>	Louisa Chisholm, Senior Claims Specialist <i>Liberty Specialty Markets</i>  Kristin Cummings, Partner <i>Zelle, LLC</i>  Samantha Flax, COO and Co-Founder <i>Flax &amp; Associates</i>
<b>Workshop 2</b> (2 Hour)	<b>Early &amp; Combined Involvement of the Adjustment Team: Controlling the Course and the Costs of Major Losses</b> <i>This program will review the dynamics between the insurance company, the necessary consultants, the insured and their representatives. Through analysis of various cases we will demonstrate how the early and continuous involvement of all parties paves the way for swift and appropriate settlements. We 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.</i>  <i>Case One – Refinery Explosion</i> <i>Case Two – Builder’s Risk Claim for High Rise Office Construction</i> <i>Case Three – Wood Pellet Manufacturer Fire</i>
<b>Moderator</b>	Aubrey Shea, Vice President <i>JS Held</i>

**Participants**

Mark Andrews, Associate Principal  
*Thornton Tomasetti*

Maureen Myre, Claim Manager  
*AXA XL*

Michelle Pertesis, Vice President/Executive General Adjuster  
*McLarens*

**Workshop 3** (2 Hours)**The Price of Modern Technology**

*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**

Jean L. Broderick, Are, Regional Practice Leader  
Energy, Property & Construction Claims – NA  
*XL Catlin - AXA XL, a division of AXA*

**Participants**

Steve Cersine, Director of Property Claims  
*Allianz Global Corporate & Specialty (AGCS)*

Mark Ewing, Practice Leader  
*Envista Forensics*

Liz Peterson, Managing Director, UK  
*Envista Forensics*

**3:30 – 3:45****Refreshment Break****Concurrent Workshops (Cont.) 1 Hour Sessions****3:45 – 4:45 pm****Select One****Workshop 4** (1 Hour)**The Lloyd's Market – A Look at Life Inside the Square Mile**

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

*We will focus on the composition of the market. We will clearly explain the processes within Lloyd's claims handling and how these may differ from our international counterparts. We 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'.*



<b>Moderator</b>	Daniel Trenkel, Claims Manager <i>W/R/B Underwriting</i>
<b>Participants</b>	Jamie Davy, Senior Claims Adjuster <i>Cathedral Underwriting Ltd.</i>
	Isaac Franks, Senior Claims Specialist, Energy, Property, Construction <i>AXA XL</i>
	Owen Ludbrook, Director of Client Services, London <i>Sedwick</i>
	Louise Van der Valk, Claims Manager <i>THB Group Ltd.</i>

#### **Workshop 5** (1 Hour)

##### **Builder's Risk Claims: Recurring and Emerging Issues**

*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.*

<b>Moderator</b>	Samuel H. Ruby, Esq., Insurance Law Practice Group Leader <i>Bullivant Houser Bailey PC</i>
<b>Participants</b>	John Roberts, Vice President, Specialty Energy & Construction Claims <i>AIG</i>
	Granger Struck Executive Vice President, Builder's Risk Practice Lead <i>J.S. Held LLC</i>

#### **Workshop 6** (1 Hour)

##### **Building Personal and Organizational Resilience for Dealing with Crisis and Loss: The Case of Sandler O'Neil & Partners.**

*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** (*Weather Permitting*)  
(*Open to all LEA registrants*)

**Friday, January 17, 2020**

**7:30 – 11:45 am**

**Registration Table 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)

**Assignment of Benefits**

**Workshop 2** (2 Hours)

**Early & Combined Involvement of the Adjustment Team: Controlling the Course and the Costs of Major Losses**

**Workshop 3** (2 Hours)

**The Price of Modern Technology**

**10:30 – 11:00 am**

**Refreshment Break**

**11:00 – 12:00 pm**

**Repeat of One-Hour Concurrent Workshops**  
*Select One*

**Workshop 4** (1 Hour)

**The Lloyd's Market – A Look at Life Inside the Square Mile**

**Workshop 5** (1 Hour)

**Recurring Issues in Builder's Risk Claims**

**Workshop 6** (1 Hour)

**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:**

***Please remember that 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.***

**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)



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*Zurich N.A.*

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Jean L. Broderick, ARe  
*XL Catlin*  
*AXA XL, a division of AXA*

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Maxine E. Walker  
*FM Global*

Steven Yeo  
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*Company (UK) Limited*

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#### Board Consultant/Accountant

Gerald W. Warshaw  
*Matson Driscoll & Damico LLP*

#### CE Coordinator

Louis D. Magnan, CPA  
*JS Held*

#### Membership Chair & Web Master

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

#### Meeting Coordinator/Event Planner

Maria Sclafani  
*The Beaumont Group, Inc.*

V1.10.14.19

# WORKSHOP & EXECUTIVE FORUM REGISTRATION FORM

January 15 – 17, 2020

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  
(1/16)

Friday AM  
(1/17)

*Select One for Each Day*

## 2 Hour Sessions

# 1 - “Assignment of Benefits”

\_\_\_\_\_

\_\_\_\_\_

# 2 - “Early & Combined Involvement  
Of the Adjustment Team: Controlling  
The Course and the Costs of  
Major Losses”

\_\_\_\_\_

\_\_\_\_\_

# 3 - “The Price of Modern Technology”

\_\_\_\_\_

\_\_\_\_\_

*Select One for Each Day*

## 1 Hour Session

# 4 - “The Lloyd’s Market – A Look at  
Life Inside the Square Mile”

\_\_\_\_\_

\_\_\_\_\_

# 5 - “Builder’s Risk Claims: Recurring  
Issues in Builder’s Risk Claims”

\_\_\_\_\_

\_\_\_\_\_

#6 – “Moral Purpose and Organizational  
Resilience”

\_\_\_\_\_

\_\_\_\_\_

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

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

**89<sup>th</sup> ANNUAL MEETING & MID-WINTER EDUCATIONAL PROGRAM**  
**JANUARY 15 – 17, 2020**  
**FORT LAUDERDALE MARRIOTT HARBOR BEACH RESORT & SPA**  
**FORT LAUDERDALE, FLORIDA**

**RETIRED REGISTRATION FORM**

**REGISTRATION FEE:            \$185.00 Retired Members - Spouse**

**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 guests per firm/company for Associate Members). Guests must also otherwise qualify as a Regular or Associate member.

**\* \* \* NO REFUNDS AFTER JANUARY 8, 2020 \* \* \***  
**(Registration will not be accepted after January 8, 2020)**

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: December 23, 2019**

LEA has negotiated a special group rate of \$334.00 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) - You will be AUTOMATICALLY directed to the Fort Lauderdale Marriott Harbor Beach Resort & Spa to make your room reservations. Marriott's procedures have changed and there will not be a link forwarded as there was in the past. 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 8:00 AM on January 15, 2020 for L.E.A. members and guests. Any questions concerning the hotel, etc., contact Maria Sclafani at (718) 892-0228; e-mail: [mcs@thebeaumontgroup.com](mailto:mcs@thebeaumontgroup.com)

**89<sup>th</sup> ANNUAL MEETING & MID-WINTER EDUCATIONAL PROGRAM**  
**JANUARY 15 – 17, 2020**  
**FORT LAUDERDALE MARRIOTT HARBOR BEACH RESORT & SPA**  
**FORT LAUDERDALE, FLORIDA**

**GUEST REGISTRATION FORM**

**REGISTRATION FEE:**      Members: \$555.00      Spouse: \$185.00  
**INCLUDES:** Coffee Breaks, Wednesday Evening Reception, Thursday Lunch and Gala Reception

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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

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