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#### CONTINUING ED COORDINATOR

Louis Magnan 212-952-5000 J.S. Held Inc.

#### MEETING COORDINATOR

Maria Sclafani 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 <u>no</u> 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 you 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** 

# MEETING & HOTEL RESERVATIONS

## LEA's Website:

# 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:	
	1 0	



Loss Executives Association

P.O. Box 37 ♦ Tenafly, NJ 07670 ♦ Phone: 201-569-3346

Email: 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

8:00 – 5:00 pm Registration Opens

8:00 – 5:00 pm Speaker Ready Room Available

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** (*Open to All Registered Attendees*)

Thursday, January 16, 2020

7:30 – 9:00 am Continental Breakfast

8:00 – 5:00 pm Registration Desk Open

8:00 –12:00 pm Speaker Ready Room Available

8:00 – 8:45 am General Session/Members Meeting

8:00 – 8:05 am Welcome/Anti-Trust

Costantino Suriano, Esq., Partner Mound Cotton Wollan & Greengrass

8:05 – 8:15 am Opening Remarks & Introduction of New President

Paul Aviles – LEA President Senior Vice President

Allied World Assurance Company

8:20 – 8:25 am Treasurer's Report/Golf Report

Thomas D. Casson, AG Commercial Property and Energy

Property Claims Field Group Lead

AIG

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

JS Held

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.

**Moderator** Bill Erickson, Esq., Partner

Robins Kaplan LLP

Participants Liz Burnett

Robins Kaplan LLP

James Kitces, Partner Robins Kaplan LLP

Bill Webster, Partner Robins Kaplan LLP

**12:15 – 1:30 pm Lunch** (Open to all registered attendees)

LEA Concurrent Workshops 2 Hour Sessions

1:30 – 3:30 pm Select One

Workshop 1 (2 Hours) Assignment of Benefits

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** Christine Renella, Senior Associate

Zelle, LLP

Participants Louisa Chisholm, Senior Claims Specialist

Liberty Specialty Markets

Kristin Cummings, Partner

Zelle, LLC

Samantha Flax, COO and Co-Founder

Flax & Associates

Workshop 2 (2 Hour) Early & Combined Involvement of the Adjustment Team: Controlling the

**Course and the Costs of Major Losses** 

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.

Case One - Refinery Explosion

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

Cast Three – Wood Pellet Manufacturer Fire

**Moderator** Aubrey Shea, Vice President

JS Held

#### **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'. 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

Sedwick

Louise Van der Valk, Claims Manager

THB Group Ltd.

#### 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.

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 Struck** 

Executive Vice President, Builder's Risk Practice Lead

J.S. Held LLC

#### 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  $\underline{no}$  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 <a href="https://www.lossexecutives.com">www.lossexecutives.com</a>

# LE

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Raymond Mattia

AIG

**Treasurer** 

**Thomas Casson** 

AIG

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Jose Morgatoff Zurich N.A.

**Immediate Past President** 

Jean L. Broderick, ARe XL Catlin

AXA XL, a division of AXA

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Jim Jezewski Starr Technical Risks Agency, Inc.

Marisa Jelicks *Liberty Mutual Insurance* 

Michael Koski RSUI Group Inc.

Brooke Shultz Mutual Boiler Re Member of the FM Global Group

Nigel Shepherd

Aegis Security Insurance Company

Maxine E. Walker *FM Global* 

Steven Yeo Lancashire Insurance Company (UK) Limited

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#### Counsel

Costantino Suriano, Esq.

Mound Cotton Wollan & Greengrass

#### **Board Consultant**

Scott Armstrong
Werlinger & Associates, Inc.

#### **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.

# 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)	
2 Hour Sessions # 1 - "Assignment of Benefits"	Select One fo	o <mark>r Each Day</mark> 
# 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 E	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, A MEETING REGISTRATION FORM, and s registering by ma	ubmit on-line o	
	(Your name - p	orinted)

# 89th 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 <u>Associate Members</u>). Guests must also <u>otherwise qualify</u> 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 fo	r (Payable to LEA)	: \$			
ARE YOU ATTENDING THE WEDNESDAY WELCOME RECEPTION?ARE YOU ATTENDING THE THURSDAY GALA RECEPTION?					
NAME:				165	110
COMPANY:					
ADDRESS:					
CITY/STATE:					
TELEPHONE:					
NAME TAG DESIGNA	ATION:				
Last	First		Spouse First Nan	ne	
		Mail to:	Loss Executives Asso C/O Edward R. Reill 580 Sylvan Avenue – Englewood Cliffs, NJ Telephone: 201-569-	ly & Co., Inc. Suite 1K 1 07632	

#### \*\*\*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.

msuliman@reillyandco.com

REGISTER ONLINE with a credit card at <a href="www.lossexecutives.com">www.lossexecutives.com</a> - 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

# 89th 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

#### \*\*\*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 <u>Associate Members</u>). Guests must also <u>otherwise qualify</u> as a Regular or Associate member.

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Enclosed is my check fo	r (Payable to LEA	a): \$			
ARE YOU ATTENDIN					
ARE YOU ATTENDING THE THURSDAY GALA RECEPTION?					No
NAME:					
COMPANY:					
ADDRESS:					
CITY/STATE:					
TELEPHONE:					
NAME TAG DESIGNA	ATION:				
Last	First		Spouse First Nan	ne	
		Mail to:	Loss Executives Asso C/O Edward R. Reill 580 Sylvan Avenue – Englewood Cliffs, NJ Telephone: 201-569- Fax: 201-569-6826	y & Co., Inc. Suite 1K 1 07632 -3346	

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