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J. Southall Stone 804-869-6565

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Louis Magnan 212-952-5000 Harris Berenson, Esq. 508-855-2399 J. Southall Stone 804-869-6565

### MEETING COORDINATOR

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

### WEB MASTER

Peggy Reilly 201-569-3346 Edward R. Reilly & Co., Inc.

### WEB SITE ADDRESS

www.lossexecutives.com

November 12, 2014

Dear LEA Member:

On behalf of the LEA Board of Directors I am delighted to invite you to join us at our upcoming Annual Conference to be held January 28 - 30, 2015 at the Tampa Marriott Waterside Marina in Tampa, Florida.

Our Tampa program will feature a Thursday morning session consisting of the following topics: Building Performance and Risk Mitigation Research Results - IBHS (Insurance Institute for Building and Home Safety, Nanotechnology: Prospects for the World's Smallest Claim, and Property Insurance Case Law Update ("Bill and Jim Show"). The afternoon and Friday morning workshops are as follows: Offshore Energy Insurance and Claims, Ethical Crossroads: Which Way Do I Go?, Earthquake Damage & Claims – Lessons Learned, and OSHA's Effect on Business Interruption Claims. For more information on the program and how to register, visit the LEA website at www.lossexecutives.com.

As always, the LEA offers CE at our programs.

Thanks to all for a great conference in Boston this past June. We enjoyed the largest attendance for a June conference in the history of the LEA, or 358 registered. Again, really appreciate all that could attend and thank you so much for making this a very successful event.

We already have our second "Young Professionals Day" scheduled for Thursday, November 13th, which will be held at St. John's new campus building at Astor Place, in NYC. We have over 120 registered for this event and plans to be a very informative session. We have a great agenda and a tremendous lineup of presenters, including Professor Paul Walker of St. John's School of Risk Management.

Finally, we do encourage new members (and existing) to volunteer to participate as speakers at our programs. We are always looking for new and innovative ways to educate our members and welcome the opportunity for everyone to be involved in some way.

I hope to see you at our Tampa Conference in January 2015.

With kind regards,

### Kevin Ennis

President



# Rod Birmingham Memorial Golf Tournament 2015

### Westchase Golf Club

Date: January 28, 2015 Time: 11:30 a.m. Cost: \$145 per player



- Shamble teams will be paired equitably
- Trophies classy
- Prizes approximately 30% will win a prize
- Awards Following
- Play in 4.5 hours

Deadline to Register is January 23, 2015

Name:	hdcp or ave. score:	

Please include golf fee in your registration payment. Note on form if paying for an additional conference registrant. Additional details to golf registrants will be emailed in early January.

# MEETING & HOTEL RESERVATIONS

# LEA's Website:

# www.lossexecutives.com

User Name: Your Email Address
Password: 1234 (Unless You've Changed It)

LEA has negotiated a special group rate of \$249.00 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 Tampa Waterside Marriott 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.



### **Loss Executives Association**

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

Email: info@lossexecutives.com

### 84th ANNUAL MEETING & EDUCATIONAL CONFERENCE

Marriott Waterside Hotel & Marina ♦ 700 South Florida Avenue ♦ Tampa, Florida ♦ 33602

**January 28-30, 2015** 

# Setting a Standard for the Future: The Rapidly Changing Landscape of Claims

### Wednesday, January 28, 2015

8:00 – 5:00 pm **Registration Open** 

11:30 am Rod Birmingham Memorial Golf Outing

Westchase Golf Club

11602 Westchase Golf Drive

Tampa, FL 33626

*Note:* Club and Shoe Rentals – To rent clubs or shoes, please call the pro

shop directly at 813-854-2331 Ext. 1

\*Please note that the LEA will not be holding an Executive Forum at the

January meeting.

6:00 – 8:00 pm Opening Night Reception

(Open to All Registered Attendees)

Thursday, January 29, 2015

7:30 – 5:00 am Registration Desk Open

8:00 – 9:30 am Continental Breakfast

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

8:30 – 8:45 am General Session/Welcome

Kevin Ennis, LEA President Swiss Re America Holding Corporation **Program Remarks** Southall Stone, LEA Program Chair

**Independent Consultant** 

8:45 – 9:15 am LEA Members Business Meeting

(All LEA Registered Members are Invited to Attend)

9:15 – 10:15 am Guest Speaker

**Presenter** Carl G. Hedde, CPCU, Senior Vice President

Underwriting Services - Head of Risk Accumulation

Munich Reinsurance America, Inc.

Topic Building Performance and Risk Mitigation Research Results - IBHS

(Insurance Institute for Building and Home Safety)

Mr. Hedde will give an overview of who the IBHS is, how the research relates to the industry, what the impact on the claims settlement impact might be, and talk about how the claims professional can help move society forward in building safer homes and businesses. The talk will focus on current research

results and how building practices can be changed.

**10:15 – 10:30 am Refreshment Break** 

10:30 – 11:30 am Nanotechnology: Prospects for the World's Smallest Claim

There have been few, if any, first party property insurance claims involving damage caused by nanotechnology-based products, i.e. products that manipulate matter on an atomic, molecular, and supramolecular scale. Similarly, there are no publicly known insurance cases involving damage to property classified as nanotechnology. However, because this revolutionary development in physics and material science has proliferated in our everyday life, it is only a matter of time before insurance claims involving nanotechnology will be made under traditional property insurance forms or specialized coverages some insurers already offer for nanotechnology.

This session will be led by an engineering expert, claims manager, and coverage lawyer who will outline some of the technical, claims handling, and legal issues that are likely to arise in a claim involving nanotechnology. The presentation will include one or more hypothetical claim scenarios intended to facilitate discussion.

**Facilitator** Craig Eberhardt, Ph.D, Senior Technical Consultant

Mechanical and Aerospace Engineer

LWG Consulting

**Presenters** Douglas Backes, Operations Claims Manager

FM Global

Sava Alexander Vojcanin, Partner

Clausen Miller P.C.

### 11:30 – 12:30 pm

### **Property Insurance Case Update**

Give us sixty minutes and we'll give you the year in review! Bill Erickson and Jim Harrington of Robins Kaplan, Miller & Ciresi L.L.P. will update you on the most important and interesting property insurance case decisions of the year. Cases illustrating important trends in a variety of areas will be featured, including the latest decisions on fortuitous physical loss, exclusions and limits in storm claims, excess insurance, CBI coverage, suit limitations and whether an adjuster can be sued for negligent misrepresentation. The Property Case Update is not a lecture session. Join us for a fast-paced combination of audience participation and case discussion covering the recent cases and trends you need to know.

**Speakers** 

William N. Erickson, Esq., Partner Robins, Kaplan, Miller & Ciresi LLP

James S. Harrington, Esq., Partner *Robins, Kaplan, Miller & Ciresi LLP* 

12:30 - 1:30 pm

Lunch

(Open to All Registered Attendees)

1:30 - 4:30 pm

### **LEA Concurrent Workshops**

(Please select the one you wish to attend)

### Workshop 1

### **Offshore Energy Insurance and Claims**

This session will provide a general overview of the offshore energy insurance market place, the kinds of coverages available, the kinds of claims offshore, and recent litigation concerning additional insureds.

Insurance for the offshore energy industry has constantly been evolving from first beginning in the 1950s. Claims arising in the offshore energy industry are typically large, complex and involve a variety of issues that warrant the need for multiple areas of expertise. Managing an offshore energy claim requires an understanding of the policies and contracts, and technical knowledge of vessels, equipment, and operations. This session will highlight items necessary for managers to consider when procuring insurance or dealing with a claim in the offshore energy industry.

The presenters for this session include three adjusters that specialize in offshore energy claims and a lawyer with intimate knowledge of recent litigation concerning additional insureds stemming from the legal cases involving the Macondo blowout and oil spill.

**Facilitator** 

Bryan Johnson, President

BC Johnson Associates – A Unit of York SLA

**Presenters** 

Steven Butler, Vice President

BC Johnson Associates – A Unit of York SLA

Rodney Winkler, Vice President

BC Johnson Associates – A Unit of York SLA

# Stephany Olsen-LeGrand, Associate Sutherland Asbill & Brennan LLP

### Workshop 2 Ethical Crossroads: Which Way Do I Go?

Properly adjusting property insurance claims requires skill and knowledge that must be applied in a favor and ethical fashion. The adjuster and the adjusting team have a variety of duties: duties to the policyholder; duties to their employer, whether it be an insurance company or an independent adjusting firm; and duties to the applicable regulatory agencies or insurance departments.

When confronted with choices, how can we best ensure that our decision-making is ethical? What tools can we bring to the task? How can we test the ethics of our choices?

This session will include both instruction and interactive case studies to develop practical approaches that will enable ethical decision-making.

**Facilitator** Joseph Gerber, Esq., Senior Counsel

Cozen O'Connor

**Presenters** Frank Bayer, Vice President & General Executive Adjuster

Ace Group Ltd.

Daniel Q. Harrington, Esq., Partner

Cozen O'Connor

Kammy Poff, Esq., Litigation Consultant

Allstate Insurance Company

Katharyn E. Tompson CPA, CFF, Partner

**RGL** Forensics

### Workshop 3 Earthquake Damage & Claims – Lessons Learned

Earthquake events can cause catastrophic damage and extensive exposure to insurers. The investigation and resolution of earthquake claims involves specialized issues that require training and skills beyond those needed in general catastrophe scenarios.

The potential severity, relative infrequency of and sudden onset of earthquake events is such that regular training and skills refreshment is essential. This session will be presented by an attorney, a claims adjuster and structural and geotechnical engineers, all experienced in the assessment and handling of complex earthquake related claims in the United States and elsewhere, including the use of alternative dispute resolution, litigation and trial.

There will be discussion and illustration of how earthquakes affect structures differing types pre-catastrophe planning, damage investigation and assessment and claim adjustment. The facts of a hypothetical commercial earthquake loss will be used to exemplify earthquake and related insurance coverages and their interaction in the adjustment of the claim.

**Facilitator** 

Peter S. Evans, Executive General Adjuster/Owner

Evans Adjusters

**Participants** 

Marjie D. Barrows, Esq., Partner

Foran Glennon Palandech Ponzi & Rudloff PC

John A. Egan, GE, Principal

SAGE Engineers, Inc.

Terrence F. Parent, Senior Principal

Wise, Janney, Elstner

Workshop 4

### **OSHA's Effect on Business Interruption Claims**

Business interruption claims often involve intensely factsensitive scenarios that require technical but practical analysis in order to adjust such claims sensibly and convincingly. Some of these issues can become even more complex when you are dealing with a new facility, which has not had a history of revenues on which the insured can base such a claim. On top of these considerations, when the incidents giving rise to these claims affect worker safety, OSHA becomes involved, but can "freeze" adjustment activity at the facility, leading to additional issues and hurdles for insureds and insurers in assessing and managing business interruption and subrogation claims.

This session will be an interactive workshop which will address all of these issues through a lecture portion and table discussions of a hypothetical scenario. The program will be led by an attorney, claims manager, and consultants, all of whom have handled complex business interruption claims. The session will be premised on specific policy language, with alternative language being presented to generate discussion as to how policy language affects the presentation and measurement of these claims.

**Facilitator** 

Jeffrey S. Weinstein, Esq., Partner *Mound Cotton Wollan & Greengrass* 

**Participants** 

Marc Giovannetti, Assistant Vice President

Scor Re

William Kramer, President William A. Kramer & Associates

Michael Rotolo, Executive General Adjuster William A. Kramer & Associates

William Bradshaw, CPA, CVA, CFE, Managing Partner *Matson Driscoll & Damico* 

Alan Purbrick, CEO

Capital Consulting International

3:00 – 3:30 pm Refreshment Break

Refreshment Break time is at the discretion of the workshop speakers but

should be taken between 3:00 – 3:30 pm

6:00 – 8:00 pm LEA Reception

(Open to All LEA Registrants)

Friday, January 30, 2015

7:30 – 11:45 am Registration Table Open

7:30 – 8:30 am Continental Breakfast

(Open to all Registered Attendees)

8:30 – 11:30 am Repeat of Concurrent Workshops

(Please select the one you wish to attend)

Workshop No. 1 Offshore Energy Insurance & Claims
Workshop No. 2 Ethical Crossroads: Which Way Do I Go?

Workshop No. 3 Earthquake Damage & Claims – Lessons Learned Workshop No. 4 OSHA Post Loss Investigations on BI Coverages

9:45 – 10:15 am **Refreshment Beak** 

Refreshment Break time is at the discretion of the workshop speakers but

should be taken between 9:45 -10:15 pm

11:30 am Conference Adjournment

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

session.

As a Reminder: As a reminder, Please remember that CE forms are to be signed by only an

authorized LEA CE delegate and/or by the instructor of each session.

Program Evaluations forms need to be submitted to the registration desk upon

the conclusion of the program to receive your CE forms.

IMPORTANT: In order to receive CE credit, attendees must attend the general session on Thursday as well as two alternative workshops on

Thursday and Friday. No partial credit will be given. Attendees must attend

the full sessions to receive CE credit for that session.

SAVE THE DATES

**2015 Spring Educational Conference** 

**June 10 – 12, 2015** 

**Newport Marriott** 

Visit the LEA website at <u>www.lossexecutives</u> for upcoming events!



### **Loss Executives Association**

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

Email: info@lossexecutives.com

### **OFFICERS**

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AIG AIG

Maxine E. Walker *FM Global* 

### **BOARD OF CONSULTANTS**

Counsel Douglas G. Peterson

Costantino Suriano, Esq. Douglas P. Peterson & Associates, Inc.

Mound Cotton Wollan & Greengrass

### **COMMITTEES**

CE Coordinator Program Chair

Louis D. Magnan, CPA J. Southall Stone *Magnan, Graizzaro & Associates, CPAs, LLC* 

Meeting Coordinator Membership Chair & Web Coordinator

Maria Sclafani Margaret A. (Peggy) Reilly
The Beaumont Group, Inc.
Edward R. Reilly & Co., Inc.

# WORKSHOP & EXECUTIVE FORUM REGISTRATION FORM

January 28 - 30, 2015

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 (1/29) (Select one)	Friday AM (1/30) (Select one)
# 1- Offshore Energy Insurance & Claims		1
# 2- Ethical Crossroads: Which Way Do I Go?		
# 3- Earthquake Damage & Claims – Lesson Learned		
#4-OSHA's Effect on Business Interruption Claims		
PLEASE COMPLETE THIS FO MEETING REGISTRATION FO registering by mail.	RM, ALONG WITH DRM, and submit on-l	YOUR ine or via USPS if
	(Your na	me - printed)



### **Loss Executives Association**

# 84th ANNUAL MEETING & MID-WINTER EDUCATIONAL PROGRAM

### TAMPA MARRIOTT WATERSIDE Tampa, Florida January 28 – 30, 2015

### **Continuing Education Credit Summary**

The LEA is in the process of applying for continuing education credits for the following Nine (10) states: California, Delaware, Florida, Georgia, New Hampshire, North Carolina, Oklahoma, Texas, Wyoming and Louisiana.

The following sessions/workshops are included in our application for continuing education credit approval:

### Thursday Morning:

211001 50000 21201111116	
9:15 AM – 10:15 AM	Building Performance & Risk Mitigation Research Results IBHS – Insurance Institute for Building & Home Safety
10:30 AM – 11:30 AM	Nanotechnology: Prospects for the World's Smallest Claim
11:30 AM – 12:30 AM	Property Insurance Case Update

### Thursday Afternoon:

One of the following Four Workshops:

Workshop #1	Offshore Energy Insurance & Claims
Workshop #2	Ethical Crossroads: Which Way Do I Go?
Workshop #3	Earthquake Damage & Claims – Lesson Learned
Workshop #4	OSHA's Effect on Business Interruption Claims

### Friday Morning:

One of the Four *Workshops #1, 2, 3 or 4* listed above but not the same workshop you attended Thursday.

Please note, the number of approved continuing education credits, sessions and states will be announced at the business meeting held on Thursday January 29, 2015 from 8:45am to 9:15am.

# LE

### **Loss Executives Association**

# 84th ANNUAL MEETING & MID-WINTER EDUCATIONAL PROGRAM

### TAMPA MARRIOTT WATERSIDE Tampa, Florida January 28 – 30, 2015

### **Continuing Education Credit Summary**

### **Requirements:**

Participants **MUST** have their attendance records signed by an Instructor at the end of each session/workshop.

If you leave a workshop or session early, and/or you do not attend all three of the sessions listed above, you will receive no credit. **No partial credit is rewarded**. If you fail to have your attendance sheets signed by the persons described above, you will not receive credit, as per state requirements.

While the LEA works closely with the above Nine (9) states, you should not rely solely on the LEA outline, as it is your individual responsibility to keep track of each states' criteria for continuing education credits.

The NAIC has approved reciprocity for continuing education credits providing you comply with your Home State requirements. This ruling does not apply to Georgia or Florida.

### **Course Completion Certificates**

At the end of the conference, please feel free to pick up the certificate of completion for the states that apply to you. These will be signed by Louis D. Magnan. Please note that all credits will be filed for all attendees that have attended **all required sessions** for all states including Wyoming which has recently become an electronic filing state. The certificates of completion can be found at the LEA information/check-in desk.

### Attorneys, Independent Adjusters & Accountants

You might be able to satisfy your industry continuing education credits by attaching a copy of the LEA Program together with your signed attendance form. The LEA will assist you in authenticating your attendance through our attendance records.

During the course of the conference, all questions can be addressed to Harris Berenson, Louis Magnan or Sabrina Bernardi. If you have any questions after January 30, 2015, please contact Louis Magnan at <a href="magnan@mgacpas.com">lmagnan@mgacpas.com</a> or Sabrina Bernardi at sbernardi@mgacpas.com or at 212 952-5000.

# **CONTINUING EDUCATION CREDITS**

Loss Executives Association – Adjuster Attendance Record 84th Annual Meeting and Educational Conference

### January 28-30, 2015 - Tampa Marriott, Tampa, Florida

9:15 AM – 10:15 AM	Building Performance of IBHS – Insurance Institution		
	LEA Staff Signature		
10:30 AM – 11:30 AM	Nanotechnology: Prosp	ects for the World's	s Smallest Claim
	LEA Staff Signature		
11:30 AM – 12:30 AM	Property Insurance Cas	e Update	
	LEA Staff Signature		
Workshop 1, 2, 3 & 4 are	presented Thursday 1:30	) – 4:30 PM and Frid	day 8:30- 11:30 AM
Workshop #1 Offshore E			B .
	Presenter Signatu	re	Date
Workshop #2 Ethical Cro	ssroads: Which Way Do	I Go?	
Workshop #2 Banear Cro			Date
Workshop #3 Earthquake	Damage & Claims – Le	sson Learned	Date
	Presenter Signatu.		Date
Workshop #4 OSHA's Et	fect on Rusiness Interrur	ntion Claims	
Workshop # 1 OSTE1 5 Er	Presenter Signatur	re	Date
I attended the above sessi	ons and the information	on this form is corre	ct.
Print Name			
Signature			
Company Name			
Mailing Address			
City, State, Zip			
Phone Number and Email	Address		
Complete your adjuster l	icense number(s) for thos	se states for which ye	ou are requesting CE credit:
DE	FL	GA	NC
NH	OK	TX	WY
$C\Delta$			

### 84<sup>th</sup> ANNUAL MEETING & MID-WINTER EDUCATIONAL PROGRAM JANUARY 28 – 30, 2015 TAMPA MARRIOTT WATERSIDE TAMPA, FLORIDA

### ASSOCIATE MEMBER REGISTRATION FORM

<u>REGISTRATION FEE:</u> Members: \$350.00 Spouse: \$150.00 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.

# \* \* \* NO REFUNDS AFTER JANUARY 20, 2015\* \* \* (Registration will not be accepted after January 20, 2015)

Enclosed is my check for (	Payable to LEA):	\$			
ARE YOU ATTENDING	THE WEDNESDA	AY WELCOME REC	EPTION?	Yes	No
ARE YOU ATTENDING	THE THURSDAY	GALA RECEPTION	· · · · · · · · · · · · · · · · · · ·	Yes	No
NAME:				_	
COMPANY:					
ADDRESS:					
CITY/STATE:					
TELEPHONE:					
NAME TAG DESIGNAT	ION:				
Last	First	-	Spouse First N	ame	
		Mail to:	Loss Executives A	ssociation	
			C/O Edward R. R		c <b>.</b>
			580 Sylvan Avenu		
			Englewood Cliffs,		
			Telephone: 201-5		
			Fax: 201-569-682	26	

### \*\*\*Hotel Accommodations\*\*\* - Cut-Off Date: December 29, 2014

LEA has negotiated a special group rate of \$249.00 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 Tampa Waterside Marriott 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 28, 2015 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

### 84<sup>th</sup> ANNUAL MEETING & MID-WINTER EDUCATIONAL PROGRAM JANUARY 28– 30, 2014 TAMPA MARRIOTT WATERSIDE TAMPA, FLORIDA

### **GUEST REGISTRATION FORM**

<u>REGISTRATION FEE:</u> Members: \$495.00 Spouse: \$150.00 INCLUDES: Coffee Breaks, Wednesday Evening Reception, Thursday Lunch and Gala Reception

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

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# \* \* \* NO REFUNDS AFTER JANUARY 14, 2014\* \* \* (Registration will not be accepted after January 14, 2014)

Enclosed is my check for	(Payable to LEA):	\$			
ARE YOU ATTENDING	G THE WEDNESDA	AY WELCOME R	RECEPTION?	Yes	No
ARE YOU ATTENDING	ION?	Yes	No		
NAME:					
COMPANY:					
ADDRESS:					
CITY/STATE:					
TELEPHONE:					
GUEST OF:					
NAME TAG DESIGNA	TION:				
Last	First		Spouse First N	lame	
		Mail to:	Loss Executives A		
			C/O Edward R. I 580 Sylvan Avem		•
			Englewood Cliffs		
			Telephone: 201-	569-3346	

### \*\*\*Hotel Accommodations\*\*\* - Cut-Off Date: December 29, 2014

LEA has negotiated a special group rate of \$249.00 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.

Fax: 201-569-6826

msuliman@reillyandco.com

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