

4 DAY Program

June 14-17, 2026
Chicago, IL

2026 Marcus Payne Advanced E&S



Marcus Payne Advanced E&S



WSIA Marcus Payne Advanced E&S participants learn about wholesale distribution issues and best practices, industry regulatory issues, marketing, the claims process and the reinsurance impact upon the wholesale, specialty and surplus lines industry from top industry professionals who bring years of experience and expertise. With virtual facilitation, participants learn comprehensive information to apply immediately to strengthen any business and they look at current industry-related issues and trends as they network with others in the industry. *Completion of the WSIA Excess & Surplus Lines program is not a prerequisite.*

WHO should attend

E&S professionals with **5-15 years** of experience in the surplus lines industry will benefit from this program. WSIA's Excess & Surplus Lines program is not a prerequisite, but past participants are strongly encouraged to attend.

Diving into the E&S Specifics: Issues and Challenges

Program topics

- **The Broker/Underwriter Relationship** - Discuss the dynamics in the placement of business between excess and surplus lines company underwriters and transactional brokers.
- **Creating Surplus Lines Customer Value** - Discuss the key elements of evaluating new appointments, and how to develop existing business relationships beyond transactions
- **The Devil's in the Details** - Review standards and procedures to reduce errors and omissions exposures.
- **Avoiding the Sting** - Understand the regulatory arena to prevent unintended consequences of non-compliance.
- **Reinsurance and the Specialty Marketplace** - Learn about current reinsurance issues and trends and the impact of reinsurance on the marketplace.
- **Conquering Financial Statements** - Review key financial metrics for brokers and carriers, overall surplus lines industry financial results, and tips to understand financial information.
- **The Claims Experience** - Look at the surplus lines claims process, coverage and liability issues.

WHAT to expect

- Discuss key functions, processes, issues and challenges facing experienced surplus lines professionals.
- Facilitated presentations led by surplus industry executives, classroom discussion, study group breakouts, case studies, student led presentations, executive panel and networking opportunities.

Gain a comprehensive foundation

Industry experts explore the industry issues and trends and discuss the roles of the players in the surplus lines marketplace. Advanced E&S participants will:

- Identify the dynamics of the broker/underwriter relationship and gain tools to strengthen the transactional relationships.
- Analyze the impact of reinsurance on the surplus lines industry.
- Acquire the tools to mitigate the impact of errors and omissions claims.
- Discuss financial indicators for firms and the impact of market cycles.
- Examine the cause and effect of scams and tools to prevent them.
- Evaluate real claim scenarios with a team and consider claims handling options.

WHEN

June 14-17, 2026

COST

Tuition is \$1,950 per participant.

WHERE

Chicago, IL

Training Facility:
Gleacher Center
511 N Columbus Dr.
Chicago, IL 60611

Hotel:
Loews Chicago Hotel
455 N Park Drive
Chicago, IL 60611

FEATURING
an executive panel

Join the discussion among a panel of surplus lines professionals. Here’s a chance to ask questions and meet industry executives. For more information regarding the panel participants, check out www.wsia.org.

“I had a thorough understanding of the industry prior to the course. However, the program enhanced my acumen, broaden my understanding for the E&S market needs and service.”

— CALEY CRAIG, RSUI GROUP

“The networking was great, and I really enjoyed the mix of groups for the group activities, which made for even more networking. I appreciate everyone’s time and assistance in making this event such a great experience. I found the trial group activity along with the claims group activity to be fun and engaging.”

— JEREMY HUANG, WORLDWIDE FACILITIES

WSIA TECHNICAL TRAINING & PROFESSIONAL DEVELOPMENT

Surplus Lines Fundamentals For professionals seeking an introduction to the E&S industry ONLINE COURSE	Underwriting Boot Camp For underwriters with single-line experience or employees in a technical role seeking to move into an underwriting role in the future	Marcus Payne Advanced E&S For E&S professionals with 5-15 years of insurance experience to strengthen their surplus lines knowledge	Surplus Lines Management For professionals transitioning into leading teams while still responsible for their own book of business <i>Offered with Emory University Goizueta School of Business</i>	EduTech Connect For industry professionals seeking technical training or innovation and digital transformation sessions, with a blend of networking and opportunities to interact with solution providers
.... EARLY-CAREER	 INTERMEDIATE	 EXPERIENCED	ALL LEVELS	
Excess & Surplus Lines For professionals early in their careers to gain understanding of broker/carrier relationships and how surplus lines works in the marketplace	Collaborative Selling and Negotiations For any surplus lines professional who transacts business and has relationships with clients	Leading People and Teams For anyone in a leadership role or transitioning to a leadership role	Executive Leadership Summit For senior-level professionals developing and implementing strategic planning, leadership and change <i>Offered with University of Virginia Darden School of Business</i>	Technical Training Customized intermediate sessions that strengthen E&S professionals’ knowledge and skills in a specific area



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