



# WSiA PAC

## ANNUAL REPORT

### WSiA PAC weathers pandemic year with strong totals

No organization was spared from the challenges brought on by the COVID-19 pandemic, including the WSiA PAC. While the PAC fell short of its ambitious \$200,000 goal in 2020, it reached the second highest annual fundraising total ever and, as a result, made a major impact on the 2020 elections that were most consequential to the wholesale, specialty and surplus lines industry. During

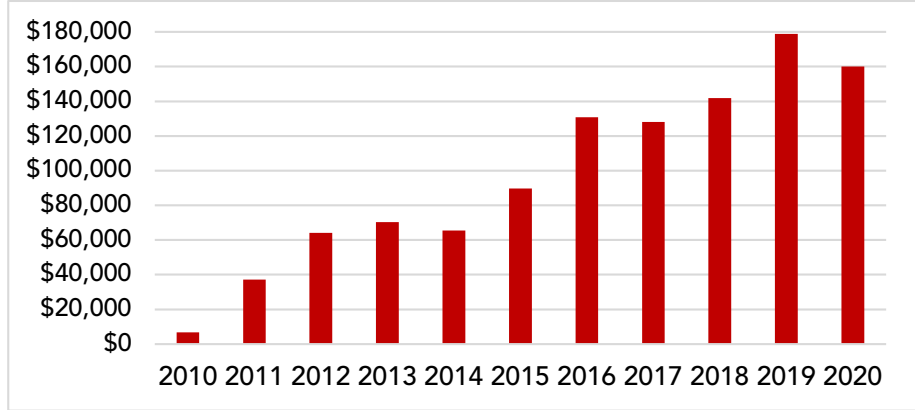
2020, **255 WSiA members** contributed **\$160,115** to the PAC. These contributions helped the PAC end the year with a balance of \$388,115.

Thank you to all the 2020 contributors who supported the PAC during an especially trying time. That support positions the WSiA PAC for a successful 2021.

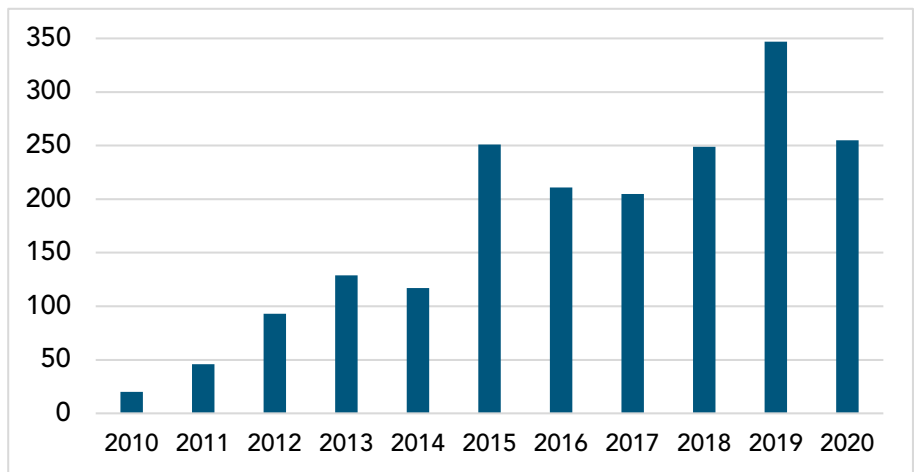
	2016	2017	2018	2019	2020 <sup>(1)</sup>
Beginning Balance	\$ 92,845	\$ 135,957	\$ 154,587	\$ 235,623	\$ 300,697
Contributions	130,826	128,120	141,887	178,845	160,115
Refunds	-	2,000	-	(100)	-
Disbursements	(83,000)	(106,500)	(55,700)	(107,500)	(68,500)
Administrative Expenses	(4,714)	(4,990)	(5,150)	(6,171)	(4,197)
Ending Balance	<u>\$ 135,957</u>	<u>\$ 154,587</u>	<u>\$ 235,623</u>	<u>\$ 300,697</u>	<u>\$ 388,115</u>

(1) As of December 31, 2020

### Growth in PAC contributions over time



### Total PAC contributors over time



# 2020

## by the numbers

CONTRIBUTIONS to the PAC  
**\$160,115**

.....

PAC CONTRIBUTORS  
**255 individuals**

.....

U40 CONTRIBUTORS  
**44 individuals | \$14,665**

.....

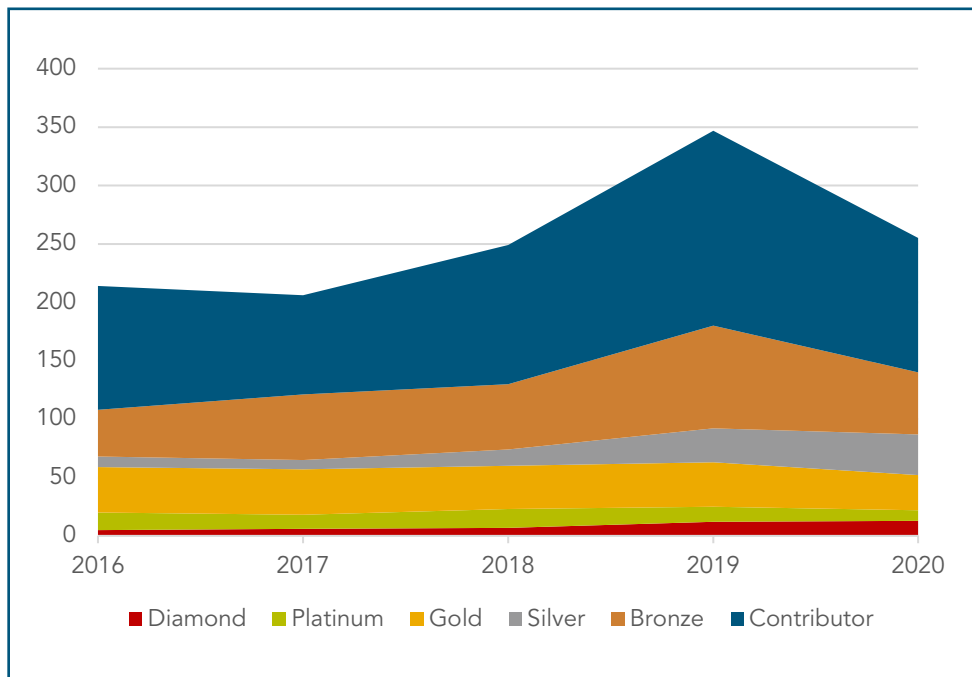
NEW CONTRIBUTORS  
**79 | \$22,735**

.....

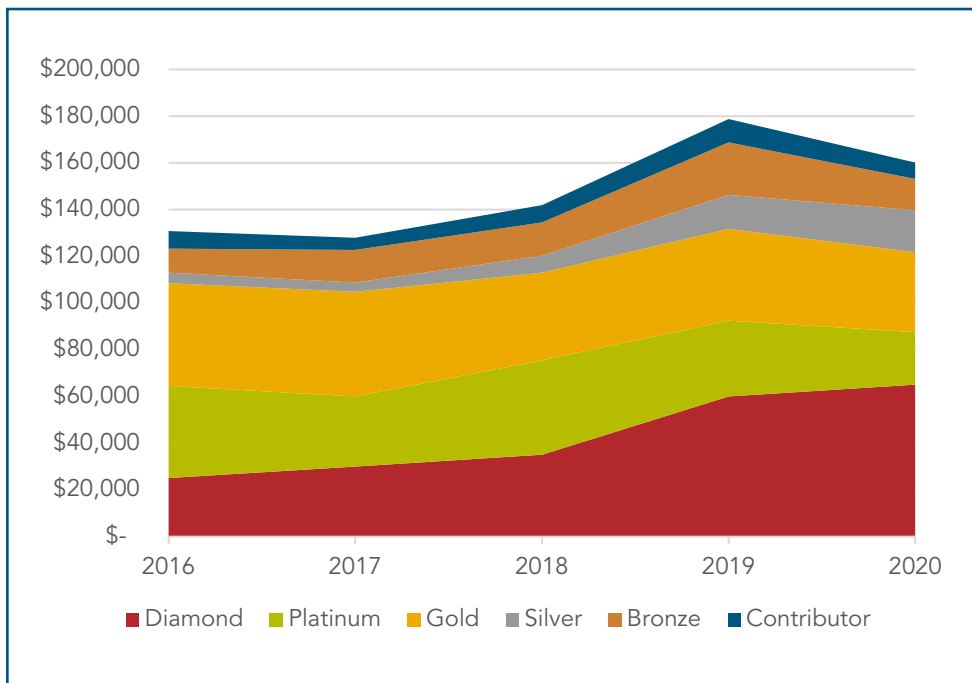
COMMITTEE MEMBER CONTRIBUTORS  
**107 | \$68,475**

.....

## BREAKING IT DOWN Contributors by level of giving



## Contributions by level of giving



## PAC COMMITTEE MISSION

The PAC Committee raises awareness within the WSIA membership regarding the efforts and focus of the WSIA PAC. The federal PAC was established in 2005 and is critical to WSIA's legislative and regulatory advocacy efforts. The PAC Committee supports candidates for the U.S. House of Representatives and Senate whose philosophies and attitudes are consistent with the goals of WSIA, the surplus lines industry and the wholesale brokerage system.

## 2020 PAC COMMITTEE MEMBERS

**COMMITTEE CHAIR**  
Phillip McCrorie, *RSUI*

Matthew Brady, *Burns & Wilcox*

Cliston Brown, *Surplus Line Association of California*

Nenad Djordjevic, *Origin Specialty Underwriters Agency, LLC*

Timothy Drag, *Starr Surplus Lines*

Mimi Fiske, *Markel*

Jim Hemphill, *Markel*

Kacy Jones, *IAT Insurance Group*

Fred Karlinsky, *Greenberg Traurig*

Daniel J. Kaufman, *Burns & Wilcox*

Mick Kroll, *Amwins Group, Inc.*

Joe Labieniec, *CapSpecialty*

Henry A. Lopez, *Navigators Management Co.*

## Key 2020 legislative and regulatory priorities and updates

WSIA PAC contributions are critical to achieving and maintaining [WSIA's Regulatory Principles](#), and 2020 was a shining example of why these principles require constant attention to protect the past achievements and future goals of the wholesale, specialty and surplus lines industry. As the pandemic forced states into lockdowns to protect public health, many business groups expected the property and casualty insurance industry to cover the associated losses in revenue.

As WSIA members provided accommodations to customers, they were also left with the difficult task of explaining why business interruption coverage was never designed, priced or intended to provide protection against communicable diseases like COVID-19, or the associated civil closures initiated by state and local governments. As pressure mounted from business groups, some members of Congress and state legislators introduced legislation that would have rewritten business interruption insurance policies to include coverage for loss related to the pandemic, despite clear wording within policies that coverage was never intended. Fortunately, each of these efforts at both the federal and state level ultimately failed, but only because of strong support from members like you and a continued commitment to the WSIA PAC.

In addition to protecting the sanctity of existing insurance contracts, the PAC has given WSIA the clout to make progress on three longstanding federal initiatives:

- Appointment of the board for the [National Association of Registered Agents and Brokers \(NARAB\)](#) which would simplify the nonresident licensing process for insurance agents and broker;
- Long term reauthorization of the National Flood Insurance Program (NFIP) and implementation of federal rules regarding [private flood insurance](#) that would clearly permit the surplus lines industry to issue flood insurance policies that satisfy FHA lender requirements; and
- Legislation that would provide a safe harbor for insurers engaging with marijuana-related businesses in states where some form of legalized marijuana industry exists.

Your PAC dollars help ensure the viability of the surplus lines industry through these initiatives for years to come. To learn more about WSIA's recent efforts in Washington D.C. and beyond, please see the [April 2021 Comprehensive Legislative and Regulatory Update](#) and visit the [WSIA Legislative Advocacy, Compliance & PAC webpage](#).



## Pandemic brings changes to surplus lines advocacy strategies

The WSIA PAC, always a critical resource for campaign finance for advocates of the wholesale, specialty and surplus lines industry, had to adjust in 2020. In a typical election year, WSIA's lobbyists at Faegre Drinker are inundated with requests to attend in-person fundraisers for members of the House Financial Services Committee and Senate Banking Committee. In 2020 and 2021, cocktail receptions were replaced by online events and the WSIA team made lemonade out of lemons.

"Everybody had challenges during the pandemic, but lobbying and campaigning are inherently personal functions that are especially hard to replicate on a video call," said Josh Andrews, Senior Director

at Faegre Drinker. "The good news is that congressional staff embraced technology and, in some ways, legislative collaboration actually improved."

Andrews said that while personal connections can be difficult to forge during online meetings, the virtual format sometimes allowed the WSIA team to include members in legislative meetings who would not have otherwise been able to participate. Involving subject matter experts in meetings with Congress is an effective strategy that works well for WSIA, as evidenced by the success of the annual Legislative Fly-In.

Keri Kish, WSIA's Director of Government Relations, said that while it was

disappointing that WSIA's 2020 Legislative Fly-In was canceled due to the pandemic, the association had a great deal of success keeping in touch with Congress. "We're all looking forward to traveling and seeing our colleagues in person, but during the pandemic we were definitely able to maintain beneficial contact with our friends in Washington D.C. during an election year."

The WSIA legislative team is looking forward to achieving its goals with a new Congress and hopes to resume in-person legislative meetings in late-2021. To learn more about WSIA efforts in Washington D.C. please visit the [Federal Issues webpage](#).

## Congratulations to the 2020 firm competition winners!

For the second year in a row, employees of RT Specialty and Burns & Wilcox took top honors for WSIA PAC participation. RT Specialty employees contributed the most money and Burns & Wilcox had the most contributors. For their efforts, both firms were awarded \$2,500 to donate to charities of their choice. Thank you to the employees of both firms who contributed! In 2021, the company competition will award prizes to both a company and a wholesale broker WSIA member firm with the most contributors and highest dollar amount of contributions to the WSIA PAC.



**Thank you to the employees of RT Specialty who collectively contributed \$29,060 to the WSIA PAC during 2020.**



**Thank you to the 43 employees of Burns & Wilcox who contributed to the WSIA PAC in during 2020.**

The most effective way for the WSIA PAC gain new contributors is by direct outreach by member firms to their employees. The WSIA team is here to help with the following resources:

- [Introduction video](#)
- [Materials and presentations](#)
- [Solicitation guidelines](#)
- [Sample letters to key employees](#)

To learn more about how you can help raise money for the PAC and earn recognition for your firm, and for assistance in communicating about the importance of the WSIA PAC with your team, please contact John Meetz, [john@wsia.org](mailto:john@wsia.org).



## THANK YOU to these 2020 WSIA PAC contributors!

### DIAMOND

\$5,000

Rob Anderson  
Nick Cortezi  
Steve DeCarlo  
Rupert Hall  
Harry Johnson III  
Alan Kaufman  
Dave Leonard  
Phillip McCrorie  
Davis Moore  
Patrick Ryan  
Shirley Ryan  
Truist Financial Corporation  
Federal PAC  
Tim Turner

### PLATINUM

\$2,500-\$4,999

Brenda (Ballard) Austenfeld  
Bob Greenebaum  
Gil Hine  
Danny Kaufman  
Carlton Maner  
Brendan Mulshine  
Lana Parks  
Bryan Sanders  
Richard Schmitzer

### GOLD

\$1,000-\$2,499

Josh Ammons  
Matthew Brady  
Sandra Breedlove  
Joel Cavaness  
JB Civille  
Bryan Clark  
Skip Cooper  
Nenad Djordjevic  
Erin Dolan  
Mimi Fiske  
Wes Henry  
Timothy Horton  
Wendy Houser  
Chris Houska  
Fred Karlinsky  
Brady Kelley  
Bruce Kessler  
Neil Kessler  
Jefferey Lejfer  
Christopher Lewis  
Matt Nichols  
Dave Obenauer  
Scott Purviance

Jim Roe  
Jacque Schaendorf  
Tiffany Shillito  
Scott Smith  
Fred Steves  
Adam Terry  
Coryn Thalmann

### SILVER

\$500-\$999

Nick Abraham  
Scott Anderson  
Lynn Bordelon  
Michael Byrne  
Tony Chimera  
Scott Culler  
Shannon Dahlke  
Dave DeMott  
Steven Dresner  
Casey Evans  
Lynne Fletcher  
Amicia Hine  
Bill Hopkins  
John Horton  
Corrine Jones  
Pierson Jones  
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Matt Lynch  
Christa Nadler  
William Nichols  
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Conor O'Leary  
Marya Propis  
Joe Quigley  
Eric Quinn  
Robert Rey  
Gregory Rubel  
Robert Sanders, Jr.  
Jan Shemanske  
Leonard Sjostrom  
Benjamin Sloop  
Paul Springman  
David Toombs  
Danielle Wade  
Tracy Wade

### BRONZE

\$250-499

Patrick Albrecht  
Erin Bagley  
Wayne Bates  
Laura Beckmann  
Valerie Brands-Martin  
Cliston Brown  
Amber Carver

Tim Chaix  
John Clarke  
Kathy Colangelo  
Daniel Confalone  
Peter Costolnick  
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Diana DeMent  
Kristin Downey  
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Michael Franzese  
Rich Gobler  
Harvey Goldenberg  
Hank Haldeman  
Ian Hanson  
Matt Huels  
Steven Kass  
Duffy Koller  
Mick Kroll  
Dan Maher  
Mark Maucere  
Claudia May  
Robert McEwen  
Benjamin McKay  
John Meetz  
Kelsey Moore  
Lindsay Moore  
Catherine Moran  
Jason Murrey  
David Ocasek  
Judd O'Neal  
Robert Owens  
Rebecca Roberts  
Kathy Schroeder  
Caryn Siebert  
Kristen Skender  
Paul Smith  
Lisa Surprenant  
Christine Tricoli  
Terrence Villar  
David Wood  
Brad Wood  
John Wood  
Michael Yovino

### CONTRIBUTOR

Under \$250

Cynthia Aberle  
Robert Aheart  
Erika Apuan  
Elease Barnes  
Thomas Becker  
Maddie Beja  
Gretchen Blomeke  
Brett Blumencranz

Linda Bobro  
Kyle Burch  
Martha Buret  
Phillip Burke  
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Joe Sherry

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Taylor Smith  
Bonnie Steen  
Chris Stratton  
Bret Strickland  
Jordan Theodoulou  
Chris Timmerman  
Jennifer Truby  
Chelsie Tysdal

Josh Vengley  
Kelly Viviano  
David Webb  
Steve Westfield  
Karen White  
Lindsey Wingerning  
Sarah Wirtz  
Ethan Witting  
Kate Wright  
Christopher Zoidis



## Employees of these WSIA member firms supported the PAC in 2020

Admiral Insurance Group  
AJG Gallagher Bassett  
AmRisc  
AmTrust E&S  
AmTrust Group  
AmWins Group  
Arch Insurance Group  
Arlington/Roe  
Associated Insurance Administrators  
Atlantic Casualty  
Axis Capital  
Bass Underwriters  
Bell & Clements Inc.  
Brit Global Specialty USA  
Brown Riding Insurance  
Burns & Wilcox  
Canopus  
CapSpecialty  
Carnegie Agency Inc  
Century Insurance Group  
Concorde General Agency  
Coverys Specialty Insurance Company  
CRC  
Crum & Forster Surplus & Specialty Lines  
DUAL North America  
ELANY

GenStar  
Gorst & Compass  
Great American Insurance Group  
Greenberg Traurig  
Gridiron Insurance Underwriters, Inc.  
Hallmark Financial Services  
Hartford Steam Boiler Inspection Ins  
Hull & Company  
IAT Insurance Group  
IFG Companies  
Insurance House  
Ironshore Insurance Services  
J.E. Brown Associates  
Jackson Sumner Associates  
James River Insurance Company  
Jimcor Agencies  
Johnson & Johnson, Inc  
Kinsale Insurance Company  
MacNeill Group  
Markel  
McDermott Will Emery LLP  
MJ Hall and Company  
National E&S Insurance Brokers  
Nautilus Insurance Group  
Navigators  
One General Agency  
Origin Specialty Underwriters

Preferred Specialty LLC  
R.E. Chaix & Assoc  
ReSource Pro  
Risk Placement Services  
RSUI  
RT Specialty  
Scottish American  
Shelly Middlebrooks O'Leary  
Shield Commercial Insurance Services  
Sierra Specialty Insurance Services  
Sompo International  
Specialty Risk Association Inc  
Surplus Line Association of CA  
Surplus Line Association of IL  
Texas Surplus Lines Assn., Inc  
The Parks Group  
The Surplus Lines Association of CA  
Unified Fire Group  
USG Insurance Services  
Vela Insurance Services  
Virtue Risk Partners  
W.H. Greene  
Westchester  
WKFC Underwriting Managers  
Worldwide Facilities  
WSIA