

4 DAY Program

November 9-12, 2020
Virtual facilitated learning

2020 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 **multiple** 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*** - Recognize scams in the nonadmitted market and gain an overview of stamping offices with an update on key surplus lines regulatory issues.
- **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.

* CE credits approved

WHAT to expect

- The 2020 program will be a virtual learning experience.
- 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

November 9-12, 2020

REGISTRATION & COST

- Registration opens September 2020 at www.wsia.org.
- Tuition is \$350 per participant.

WHERE

At your desk • Facilitated virtual learning

With the current restrictions and changes due to COVID-19, WSIA has converted the 2020 program into a four-day facilitated virtual learning experience using Zoom as the basis.

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. The panel participants will be announced Fall 2020.

"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 & CAREER DEVELOPMENT

| | INTRODUCTORY | INTERMEDIATE | EXPERIENCED | | |
|----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ONLINE COURSES | Surplus Lines Regulatory Compliance For insurance professionals seeking an introduction to regulatory compliance Surplus Lines Fundamentals For insurance professionals seeking an introduction to E&S | 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 at Emory University's Goizueta School of Business in Atlanta, GA</i> | WSIA University Designed to improve technical underwriting competency and develop networking relationships with peers 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 | Consultative Selling and Negotiations For any surplus lines professional who transacts business and has relationships with clients | Effective Coaching For surplus lines professionals responsible for a team to receive customized coaching training | Executive Leadership Summit For E&S senior-level professionals developing and implementing strategic planning, leadership and management change <i>Offered at University of Virginia's Darden School of Business in Washington, D.C. area</i> | |



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