2020 Marcus Payne Advanced E&S

November 9-12, 2020
Virtual facilitated learning
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.

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.

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

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

ON-LINE 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
Offered at Emory University’s Goizueta School of Business in Atlanta, GA

EXPERIENCED

Executive Leadership Summit
For E&S senior-level professionals developing and implementing strategic planning, leadership and management change
Offered at University of Virginia’s Darden School of Business in Washington, D.C. area

INTRODUCTORY

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

INTERMEDIATE

ALL LEVELS

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WSIA University
Designed to improve technical underwriting competency and develop networking relationships with peers

wsia.org