

2 DAY Program

August 15-17, 2018

*(Opening Reception
on August 15)*

2018 University West

Scottsdale Plaza Resort
7200 Scottsdale Rd.
Paradise Valley, AZ



University West



WSIA will host University West at the Scottsdale Plaza Resort in the Phoenix area. All E&S industry professionals are invited to attend University West, where attendees choose from a variety of sessions and workshops to customize their learning experience.

The selection of courses include: fundamentals of the specialty wholesale insurance industry, specific property and casualty topics, current issues and trends in the wholesale market, and human resources topics. This education program delivers value to any industry professional with any level of experience.

WHO should attend

Any broker, managing general agent, underwriter, program administrator/manager, human resources professional or others in the wholesale and specialty market. The two-day education program provides sessions for professionals of all career levels and job responsibilities looking to grow their expertise in the industry.

Sessions (*Denotes Leadership Sessions)

	Time
Introduction to E&S (100)	August 16 AM
Intermediate Lloyd's (200)	August 16 AM
Intermediate Environmental (200)	August 16 AM
Construction and Insurance (200/300)	August 16 AM
P&C Common Case Studies: Restaurants, Hab, Retail/C-Stores (200/300)	August 16 AM
Emerging Issues: Artificial Intelligence and Robotics (200/300)	August 16 AM
Introduction to Inland Marine (100)	August 16 PM
Conducting a Sexual Harassment Investigation and EPLI (HR)*	August 16 PM
Emerging Risks: Autonomous Vehicles, Political Violence and Active Shooters (200/300)	August 16 PM
Mind your Ps and Qs: Prospecting, Qualifying and Questioning (100/200)	August 16 PM
The Complex World of Condos (200)	August 16 PM
Introduction to General Liability (100)	August 17 AM
Property Valuation and Equipment Breakdown (200)	August 17 AM
Manufacturers, Distributors & Importers (300)	August 17 AM
Program Business: Keys to Developing, Marketing and Managing (100/200)	August 17 AM
Effective Communication & Difficult Conversations*/Motivating and Leading Change (HR)*	August 17 AM
Survey in Insuring Prof Liability and D&O Liability: Challenges and Coverages (200/300)	August 17 AM
Introduction to Property (100)	August 17 PM
Work More Productively with DiSC (HR) <i>Pre-course DiSC assessment required.</i>	August 17 PM
The Sharing Economy and Its Insurance Implications (100/HR)	August 17 PM
Earthquake Coverage: The Process and the Product (100)	August 17 PM

WHAT to expect

- Attendees pick and choose which sessions to attend. Some courses are case study based, some are panel discussions, and others are presentations with class engagement.
- Introductory, intermediate and advanced courses are denoted by a 100, 200, and 300.

HOTEL

A hotel room block is available at the **Scottsdale Plaza Resort**. Please **click here** to make your room reservation and take advantage of the discounted rate.

All courses will be held on-site.

REGISTRATION & COST

- Register online at www.wsia.org
- Tuition is based on courses selected during registration. Courses fees are \$150 for a four-hour session and \$100-125 for a two-hour session.
- These fees include courses selected, receptions and meals during the program
- Reception only registration is \$50 per reception

Thursday, August 16 | Morning Sessions 8:00 a.m. - 12:00 p.m.

INTRODUCTION TO E&S (100)

Chris Behymer, CPCU, ASLI, CIW – Markel
Monique Riley – Markel

Are you or someone you work with not as knowledgeable about the excess and surplus lines industry as you would like to be? Do you hear terms you're not familiar with or are simply curious to find out more about how this segment of the industry came about? If any of this applies to you, don't miss our Introduction to E&S course. Hosted by industry experts, this course will explore a brief history, why the market exists, discussion of the underwriting cycles, market dynamics and the ever important role that relationships play in the success of our industry. Whether you're new to the industry or simply curious to learn more, you'll want to be a part of this fast-paced and informative course.

INTERMEDIATE LLOYD'S (200)

Rodney Smith – Lloyd's

The Lloyd's market is a significant component within the wholesale and specialty market. This course provides a comprehensive review of this unique market and provides updates on current products, trends and regulatory issues.

INTERMEDIATE ENVIRONMENTAL (200/300)

Stela Flanagan – Westchester

Environmental coverage is intended to protect against claims resulting from pollution events, whether such events are "sudden and accidental" or "gradual" in nature, that can cause bodily injury, property damage, business interruption, and significant defense and cleanup costs. Come learn more about environmental insurance, how to assess the risk and evaluate the coverage. Topics to be covered include:

- Environmental products overview
- Exposures/claims examples
- Coverage forms overview (CPL, PPL, products pollution)

CONSTRUCTION AND INSURANCE (200/300)

Rick Pitts – Arlington/Roe

Examines the various ways in which participants are aligned on construction projects then turns to a discussion of the insurance implications of construction contracts. Major construction industry forms (such as AIA and AGC) are discussed (with a particular emphasis on indemnification provisions) and the seminar concludes with an examination of worker's compensation issues in construction.

Thursday, August 16 | Morning Sessions 8:00 a.m. - 12:00 p.m.

P&C COMMON CLASS CASE STUDIES: RESTAURANTS, HAB, RETAIL/C-STORES (200)

Wendy Bissonnette – AmWINS Access
Rachel Pagliarulo – General Star Management Company
Esmeralda Temores – Worldwide Facilities, LLC

Join us for a deep dive and highly interactive discussion of underwriting issues with common classes that can be found in tourist areas. The discussion will focus on apartments, restaurants, convenience stores and trade contractors. During the course you will review case studies and discuss underwriting solutions among the participants.

EMERGING ISSUES & TRENDS: ARTIFICIAL INTELLIGENCE AND ROBOTICS (200)

Tyson (Ty) Harmon – 2THEDGE

How close is Artificial Intelligence and Robotics from becoming mainstream? What are the implications, opportunities and threats this trend presents and how is it going to disrupt the Insurance Industry? We are going to explore all these questions and hear how this new technology is already mitigating workplace injuries, improving construction site safety, supporting the internet of things and much more.

Thursday, August 16 | Afternoon Sessions 1:00 p.m. - 5:00 p.m.

INTRODUCTION TO INLAND MARINE (100)

Frank Oleskiewicz – Formerly General Star Indemnity Insurance Company

This overview of Inland Marine as a line of business include concentration in:

- Builders risks/installation
- EDP
- Bailees/Warehouse legal
- Contractors equipment underwriting

CONDUCTING A SEXUAL HARASSMENT INVESTIGATION AND EPLI (HR)

Rick Pitts – Arlington/Roe

Explore effective ways to conduct a sexual harassment investigation and avoid legal pitfalls while ensuring a quality inquiry is completed. Continue discussion into Employers Professional Liability Insurance, a seminar addressing the statistics on causes of loss in the employment setting; major employment-related laws; and the major policy provisions in most standard forms.

Thursday, August 16 | Afternoon Sessions 1:00 p.m. - 5:00 p.m.

EMERGING RISKS: AUTONOMOUS VEHICLES, POLITICAL VIOLENCE AND ACTIVE SHOOTERS

(200/300)

Maureen Brown – Munich Reinsurance America, Inc.
Ashley Ganne, RPLU+ – Burns & Wilcox

Insuring Political Violence & Active Shooter Situations:

In today's political climate the awareness of political violence and active shooter events is at an all-time high. This workshop will introduce various types of insurance coverage available for political violence and active shooter events. We will compare historical coverage for workplace violence, special event and property and liability policies to available coverage provided by specialized political violence and active shooter policies. During this workshop we will also discuss underwriting factors, selling points, and how prior political violence and active shooter polices have reacted in recent events.

Insuring Autonomous Vehicles:

A prolific wave of research and development is taking place across the world, which includes true start up software developers, existing automotive component part suppliers, multinational OEMs, and an array of others. In lockstep with the research and development, there is a growing social and media discourse on what the future holds for autonomy. In the news there are daily reports and editorials on autonomy, robotics and artificial intelligence. Some reports reference the near-term inevitability of autonomous cars "on a road near you soon." Others take a more cautious approach to the time horizon, positioning that streets crowded with self-driving vehicles are still decades away. Regardless, it is clear that autonomous vehicles are here to stay. With this reality upon us as insurance professionals, it is part of our role and responsibility to ensure that we are in a position to help our clients mitigate their risks in this emerging market.

MIND YOUR Ps AND Qs: PROSPECTING, QUALIFYING AND QUESTIONING (100/200)

Mike Shannon – TriFit Business Development

As a producer, underwriter or supervisor of a carrier, wholesaler, MGA or program administrator, developing your prospecting, questioning and qualification skills will accelerate your career. This course will provide a fundamental understanding of how to be effective in:

1. **Prospecting** – Determine how much prospecting is enough to reach your goals, how to hold yourself accountable, and develop working models you can take with you to implement at your employer. We will also create a "30-Second Elevator Pitch" that will grab their attention on your first call.
2. **Qualifying** – Learn a ten-question process for qualifying the "Business Opportunity" to go along with the technical risk. As an example, does your client have a compelling reason to end their current relationship? If you have not asked that question, you are just "quoting and hoping"!
3. **Asking questions** – Did you know there are multiple ways to ask questions? After completing this course, you will have developed 6-10 new questions using assorted styles to add to your repertoire that will help you get the conversation started and taken to a deeper level.

Thursday, August 16 | Afternoon Sessions 1:00 p.m. - 5:00 p.m.

THE COMPLEX WORLD OF CONDOS (200)

Rachel Pagliarulo – General Star
Wendy Bissonnette – AmWINS Access

This interactive class will explore the complexities involved in insuring condominiums. We will examine general liability and property concerns for both associations and unit owners.

- Determining what each party is responsible for insuring to ensure proper coverage is in place
- Ensuring proper valuation for each party
- Examination and comparison of ISO forms
- Commercial condos
- Loss assessment and miscellaneous real property coverage
- Additional insured issues
- Issues to consider for seasonal and vacation rentals
- Real life underwriting and claims case studies and examples

Friday, August 17 | Morning Sessions 8:00 a.m. - 12:00 p.m.

INTRODUCTION TO GENERAL LIABILITY (100)

Chris Beyhymer, CPCU, ASLI, CIW – Markel
Monique Riley – Markel

Business owners look to the Commercial General Liability policy to provide premises, operations and products coverage. Effective marketing and underwriting requires a strong working knowledge of the coverage, conditions and exclusions in this form. The Introduction to General Liability course is designed to assist participants in understanding the nuances of the CGL coverage form as well as some of the factors that will shape the companies underwriting, pricing and coverage decisions. The following major areas will be covered in this class:

- An overview of the nature of the liability exposure and the issues surrounding the current legal environment in the U.S.
- A review of the CGL coverage form with emphasis on the exclusions found in the standard ISO coverage part.
- Policy aggregates and the importance of maintaining adequate limits of coverage.
- The challenges associated with Additional Insured endorsements and Certificates of Insurance.
- A discussion of the unique underwriting characteristics found in some of the more common classes of business.
- A summary of why an account might be directed to a surplus lines carrier and some of the coverage issues that might result from this placement.

This class will assist wholesale agents, brokers, and company underwriters who want to learn more about the general liability insurance product.

Friday, August 17 | Morning Sessions 8:00 a.m. - 12:00 p.m.

PROPERTY VALUATION AND EQUIPMENT BREAKDOWN (200)

Kathy Suhm – Nautilus Insurance Company

During this session we will examine various property valuation methods and dissect Equipment Breakdown coverage and loss potential. By the end of this session, attendees will be able to:

- Calculate property loss potential using NLE, PML and MFL calculations
- Explain when functional replacement cost would be appropriate for an insured
- Determine the payout for a loss in a valued policy state
- Given a loss scenario, determine if an insured will incur a coinsurance penalty
- Describe the coverage provided by the Equipment Breakdown coverage form
- For a range of occupancies, identify equipment that is susceptible to an equipment failure or loss

MANUFACTURERS, DISTRIBUTORS & IMPORTERS (300)

Barbara Simpson, CPCU, ASLI, CIW – Russell Bond & Co.
Esmeralda Temores – Worldwide Facilities, LLC

Businesses involved in the making, moving or selling of products and goods are vulnerable to a myriad of risks. Not only is managing these complex risks a formidable task, but underwriting them is also. Join us for an interactive discussion on the types of general liability and property exposures faced by each of these entities. Topics will include:

- Unique loss exposures
- Products coverage
- Personal and advertising injury exposures
- Contract liability
- Valuation options
- Types of property
- Building contract requirements
- What is and what is not generally covered

You will also have the opportunity to test your knowledge with case studies and real-world examples presented in the classroom. All losses – even frivolous lawsuits – require time, money and resources that impact the livelihood of the business and its insurance partners, so please join us for a session packed with insight into how to mitigate such situations.

Friday, August 17 | Morning Sessions 8:00 a.m. - 12:00 p.m.

PROGRAM BUSINESS: KEYS TO DEVELOPING, MARKETING AND MANAGING (100/200)

Kristen Little – Gen Re Corporation
Michael Brennan – Gen Re Corporation

This course will provide an overview of the program insurance space including program identification, proposal construction, evaluation and implementation of program business. This class will benefit attendees who want to learn:

- What is a Program & What are the Benefits of a Program
- Program Distribution Models & Program Administration
- Program Markets, Market Size & Cycles
- Submission Preparation
- Due Diligence Process, Expectations & Selecting a Carrier
- Case Studies

EFFECTIVE COMMUNICATION & DIFFICULT CONVERSATIONS AND MOTIVATING AND LEADING CHANGE (HR)

Teresa Vaughn – Johnson & Johnson, Inc.
Mike Shannon – TriFit Business Development

Effective Communication and Difficult Conversations

During this workshop participants will learn to recognize a common barrier to effective communication, how to prepare for a difficult conversation and know what to do when things go wrong. This interactive, fun session will give you the skill to confidently tackle that next conversation you wish you didn't have to have.

Motivating and Leading Change

Build a productive and committed team by understanding the complimentary tools of motivation and accountability. All humans want to know that their lives have meaning, regardless of age. Knowing your staff's personal goals and holding them accountable to doing the things they do not want to do today to achieve their own goals tomorrow, develops belief in themselves – and you. This class will teach you how to use personal goal setting and accountability to achieve company objectives while creating a committed and loyal team.

SURVEY IN INSURING PROFESSIONAL LIABILITY AND D&O LIABILITY: CHALLENGES AND COVERAGES (200/300)

Rick Pitts – Arlington/Roe

The seminar is in three major parts. The first is a survey of the major professions and the liabilities unique to each. The second section addresses the common terms and conditions of insuring professionals, including the scope of the insuring clause and significant exclusions, as well as the implications of settling a professional liability claim. The third section views professional liability in the context of overall risk management for the professional's organization.

Friday, August 17 | Afternoon Sessions 1:00 p.m. - 5:00 p.m.

INTRODUCTION TO PROPERTY (100)

Kathy Suhm – Nautilus Insurance Company

Surplus lines insurers write property insurance for a wide range of businesses. These risks typically have characteristics that make them high hazard and very susceptible to loss. Effective property underwriting is the key to making a profit on such accounts. Join us as we discuss the fundamentals of property underwriting and coverage including:

- ISO Building construction types and their impact on underwriting
- Occupancy considerations
- Public versus private protection
- Assessment of exterior exposures
- The Building and Personal Property Coverage form
- The differences in the three Cause of Loss forms
- Class of business case studies

WORK MORE PRODUCTIVELY WITH DiSC (HR)

(1:00-3:00 p.m.)

Jamie Olson – Nationwide E&S/Specialty

This course focuses on the DiSC profile published by Wiley, which helps people better understand their own personalities and behaviors and provides a framework for improved understanding of others and adapting behaviors accordingly to enhance communication and productivity.

EARTHQUAKE COVERAGE: THE PROCESS AND THE PRODUCT (100)

(1:00-3:00 p.m.)

Enid Turner – AmWINS

Earthquake Coverage can be extremely lucrative as a product line however it can also be wildly inefficient to quote. We will examine how to optimize the underwriting and quoting process so that you are spinning your wheels less and binding more. We will also review the importance of secondary modifiers, the value of PML studies for your insured and evaluating the true cost of risk for the insured. Finally, we will share several value added deliverables to include with your quote so that the insured makes the decision to buy coverage based on substantive information and not just price.

Friday, August 17 | Afternoon Sessions 1:00 p.m. - 5:00 p.m.

THE SHARING ECONOMY AND ITS INSURANCE IMPLICATIONS (100/HR)

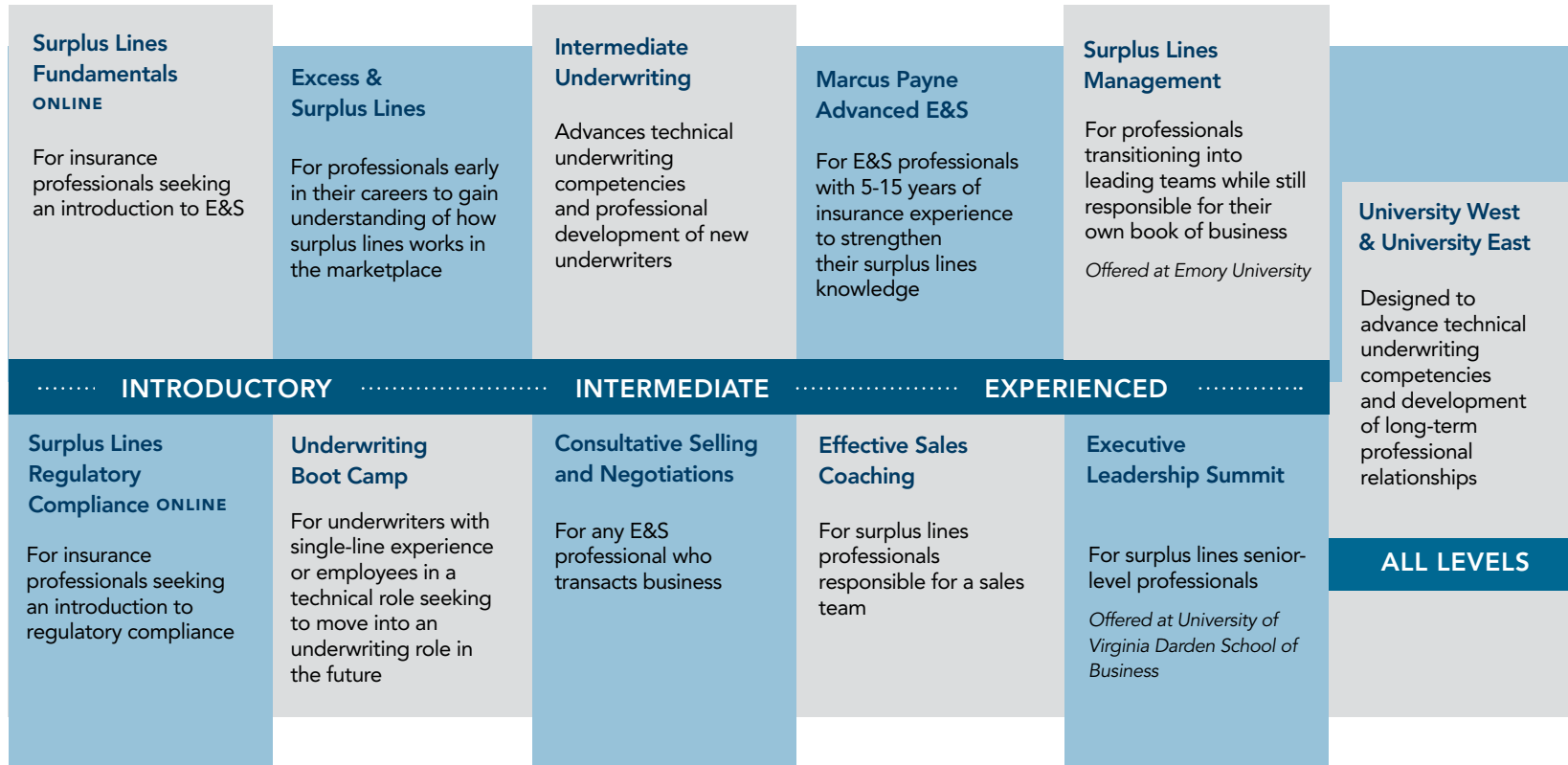
(1:00-4:00 p.m.)

Lisa Van Leuvan – RPS/Metcom

Rick Pitts – Arlington/Roe

This three hour class is designed to be an introduction to the sharing economy for insurance and human resource professionals. The primary focus of the seminar is ridesharing as an example of the new way of doing business. In this regard, the specific objective is to have students be able to identify and articulate to an insured the coverage questions arising out of ridesharing and how companies might respond. However, in a larger sense, the course objective is to alert and educate attendees on the known, recognized insurance issues arising out of the sharing economy in general.

WSIA TECHNICAL & CAREER DEVELOPMENT



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