

ILLINOIS STATE

**Katie Insurance School**

*Eleventh Annual  
Insurance Executive Forum*

**The  
Dot.com  
INVASION**

**Will E-Solutions  
Replace Traditional  
Insurance Models?**

*The Impact of E-Business and  
Technology on Insurance Risk  
Transfer and Risk Intermediation*

*Breakfast seminar for insurance  
executives and risk managers*

**Tuesday, October 16, 2001  
8-11:30 a.m.**

Fairmont Hotel  
200 North Columbus Drive  
(at Grant Park)  
Chicago  
(800) 526-2008

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## Program overview

The insurance and financial services industry is in the midst of a revolution. The benefits of a borderless, global marketplace will be reaped by insurers, reinsurers, brokers, and insurance buyers who understand E-business and its ability to enable all parties to interact more efficiently. Specifically, companies able to capitalize on the opportunities incumbent with technology and deregulation understand that the Internet provides superior ways to accomplish business. At the forefront of this revolution are the dot.com insurers who have embraced the Internet, technology, and the opportunities of E-business.

In this context, a panel of industry experts will discuss salient issues and address important questions such as the following:

- How are dot.coms applying technology and the Internet to conduct business?
- How can insurers, reinsurers, and brokers transform into a new economy company to capture E-business opportunities?
- What new skills and behaviors are needed in an E-business transaction/environment?
- How do the insurance dot.coms measure success?
- How does the advice part of the transaction get handled in an Internet mode?
- What new risks will firms face in the E-business world?
- What type of business is best positioned to capture the emerging E-business opportunities?
- How should insurance and financial services organizations rethink and reshape their business operations to remain competitive in the age of global Internet-based commerce?
- How are customers' needs changing and how can insurers, reinsurers, and brokers best meet customers' needs?
- How can businesses protect themselves from the emerging E-business risks?
- What new products and services are emerging to provide coverage for E-business risks?
- How are exposures that have very little precedent in history underwritten?

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Approaches to Internet business include virtual companies, shared service centers, virtual storefronts, and electronic intermediaries. The Internet offers revolutionary ways to achieve business goals, but it doesn't change everything. In order to thrive and improve profitability, organizations must be uniquely prepared to provide insurance and risk management solutions for tomorrow's world. The seminar will help assure that your organization has a forward-thinking E-business strategy with the right processes and people in place. You will discover new ways to become a superior provider of solutions—offering the right products and pursuing the best course toward enhancing profitability.

## **Schedule**

|            |   |
|------------|---|
| 8 a.m.     | Registration and coffee   |
| 8:30 a.m.  | Breakfast   |
| 9:15 a.m.  | Panel discussion with industry leaders and audience participation |
| 11:15 a.m. | Closing remarks   |

## **Who should attend?**

- Insurance company CEOs, CFOs, managers, and underwriters who need to know what the competition is doing to meet the challenges that lie ahead.
- Risk managers who must anticipate future needs to protect the company's assets and income against a broad array of risks associated with the business.
- Strategically oriented brokers who interface between buyers and sellers and need to be more knowledgeable about the future of the industry.
- Reinsurance brokers who seek to become the solution providers to the risks they are placing.
- Bankers and market analysts who need to keep pace with the changes and emerging trends in the new insurance and financial services environment of the 21st century.

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## Moderator

**Donna Galer** is regional manager-North America of Zurich Financial Services Group, Inc.

## Speakers

**Michael Darviche** is managing director for Marsh, Inc.'s, global portal, Marsh.com. His role is setting Marsh's E-business global strategy, as well as running the technology and services team that implements it. Previously Darviche was GM and founder of Bigfoot Interactive (an Axiom affiliate) and also a senior vice president of database strategies at Foote Cone Belding. His earlier career was with American Express Corporate Card, Small Business Services, where he managed database marketing. He has an M.B.A. from Harvard Business School and a B.A. from Tufts University.

**Robert V. James** is executive vice president, Technology Solutions, for CNA and leads CNA's property and casualty technology, processing and E-business operations, including the commercial insurance center in Maitland, Florida. James was named to lead CNA's E-business operations in May 2000. Prior to serving in this capacity, he was the chief operating officer and executive vice president of Commercial Insurance. He was formerly president, Middle Markets, for American International Group (AIG) in New York. James attended San Diego State University and the Graduate School of Sales Management and Marketing at Syracuse University.

**Richard K. Kerr** is chairman and CEO of Insurance Data Systems (IDS) and MarketScout.com. Both companies concentrate on the E-insurance industry, developing product distribution portals and other E-commerce business models. Kerr has a business degree in insurance and risk management from the University of Texas in Austin. He has experience in developing insurance business strategies. As chairman of Lambert Fenchurch US Holdings from 1995 to 2000, he founded, acquired, and consolidated MGA, TPA, retail, wholesale, employee benefit, and reinsurance companies. He has hands-on experience as a retail insurance producer for Sedgwick, Inc., where he was the #1 producer worldwide.

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**Stacey L. Regan** is deputy treasurer-insurance for General Electric Company. She attended Pace University in New York and graduated summa cum laude with a B.B.A. in finance. Regan began her career as a commercial insurance underwriter for Aetna Property and Casualty Corporation and held subsequent roles with increasing responsibilities in the area of insurance and risk management through positions at American Brands, Inc., and Becton Dickinson and Company, until joining GE Capital as risk manager. Upon consolidation of insurance operations into General Electric- Corporate, she joined the corporate insurance operation of GE as manager-insurance operations, with responsibility for GE's global specialty liability insurance program, acquisition due diligence and integration, and the Asia-Pacific region, until assuming the role as deputy treasurer-insurance. In her new role, Regan is responsible for GE's property and casualty insurance programs worldwide.

**William D. Smith** is president and chief operating officer of Kemper Insurance Companies. He is also a member of the Kemper Board of Directors. Before being elected to his current positions with Kemper in September 1996, he was with AIG as executive vice president in charge of the domestic brokerage group. Before being elected to that position, Smith held the positions of chairman and chief executive officer of Illinois National Insurance Company and New Hampshire Insurance Group, and president and chief operating officer of National Union Fire Insurance Company, all AIG companies. His earlier work was with Sears, Roebuck and Co. and Allstate. He earned his bachelor's degree from UCLA and his M.B.A. from the University of Chicago.

**Don Urbanciz** is the chief executive officer of Insurance-Noodle.com, an E-commerce insurance agency for small business, and has more than 30 years of experience in insurance and financial services. As the former president and managing director of Marsh Midwest, Urbanciz managed more than 750 employees and \$150 million in revenue. Prior to Marsh, Urbanciz was CEO of Aon Midwest, where he doubled revenues in five years through both acquisition and organic growth. Urbanciz has a Bachelor of Science in finance from Northern Illinois University.

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**Tim Wright** is chief executive officer for Riskclick and is responsible for Riskclick's strategy and direction, people and priorities, business partnerships, and investor relations. Before cofounding Riskclick, Wright had a varied career in consulting, financial services, telecommunications, and law. Most recently he was the managing partner of Booz Allen & Hamilton's UK business. Prior to consulting, he worked in Germany for a telecommunications manufacturer and studied and taught international law at the University of Cambridge. He holds a law degree from the University of Manchester and a Ph.D. in international law from Cambridge.

### **Katie Insurance School highlights**

- Undergraduate major and minor insurance and risk management
- London Market Study Tour training program
- Minority High School Scholar's Academy for the Study of Actuarial Science/Insurance
- Insurance Education Institute for High School Teachers
- Insurance-related research and industry services
- Institute for Insurance Ethics
- Student internship programs
- Continuing education and management development programs
- RIMS and QIC Quality Scorecard
- Executive-on-Campus Program
- Student Mentor Program
- Kemper Scholar Program

[www.katieschool.org](http://www.katieschool.org)

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## Registration

### Registration and payment information

*(Please duplicate this form for group registration.)*

#### Registration fees

\$135 for individuals

\$115 per person for groups of two or more

\$995 for a table seating 10 persons

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Organization

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Name #4

- Please register me/our group for the 11th annual Insurance Executive Forum.
- Individual fee** \$135 per person
  - Groups of two or more** \$115 per person
  - Table of 10 persons** \$995 per table

#### Payment information

- Check (payable to Katie Insurance School/Illinois State University) is enclosed.
- Register on-line at <http://katie.cob.ilstu.edu/execforum.html> or fax or mail this form.
- This confirms my telephone registration. Check (payable to Katie Insurance School/Illinois State University), letter of intent, or purchase order is enclosed.
- I cannot attend the forum, but I will forward this announcement to an associate. Please keep my name on the mailing list.

#### Cancellation policy

Cancellations received in writing or by telephone on or before September 28, 2001, will receive a refund of the registration fee less a \$25 processing fee. Refunds will be processed after the seminar. After September 28, 2001, no refunds will be issued. Attendee substitutions may be made at any time.

*Please return this form to*

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