

STRATEGIC RESPONDING IN UNCERTAIN TIMES

responding in uncertain times

23RD Insurance
ANNUAL Executive Forum

7:30-11 a.m.
October 15

Union League Club Chicago

Breakfast seminar for insurance executives and risk managers



KATIE SCHOOL
OF INSURANCE AND
FINANCIAL SERVICES
Illinois State University

Program overview

The insurance industry continues to operate in challenging and uncertain times, facing a combination of heightened macroeconomic, demand, and competitive risks. Buying, merging, and diversifying are commonplace as companies shift strategies to adjust to today's environment. We invite you to join us as a panel of industry executives discusses the importance of strategy in making smart and effective decisions to reach goals in today's challenging and competitive environment. They will answer questions like the following.

- Why is strategy so critical to a company to respond to an uncertain business environment?
- What can companies do to encourage strategic thinking throughout the organization and embed it in company culture?
- What must companies do to ensure that strategies remain relevant and that new strategies are implemented to drive new products, services, or business methods?
- How has the increased globalization of business impacted your company's strategies and the insurance industry's strategies?
- What are the key legislative and regulatory reform concerns that impact strategies in the insurance industry?
- Catastrophes continue to be a significant issue from a loss and coverage availability standpoint. What actions do you think the insurance industry must take to effectively deal with these issues?
- What strategies has your company implemented to adjust to and leverage market conditions?
- What impact has social media on your strategies and how do you plan to leverage it?
- What are some of the emerging risks that will impact industry strategies?

Tuesday, October 15, 2013

Schedule

- 7:30 a.m. Registration and coffee
- 8:15 a.m. Breakfast
- 9 a.m. Panel discussion with industry leaders and audience participation
- 11 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 insurance and financial services environment.

Moderator

Millie Workman is director of training and education at International Risk Management Institute Inc. (IRMI).

Speakers

Kelley Kinsella serves as senior vice president and regional executive officer for ACE USA's Midwest Region. Based in Chicago, Kinsella is responsible for setting and driving overall strategy for the region, which comprises 13 states and includes ACE USA branches in Cleveland, Minneapolis, and Kansas City. She implements regional production plans, product line distribution strategies, business development, and marketing throughout the region. She has more than 25 years of insurance and underwriting management experience. She previously served as senior vice president and chief operating officer for ACE USA's Midwest Region, where she was responsible for leadership and business development, and coordinating product line presence in 13 states. Kinsella began her career at an ACE predecessor company, CIGNA Property and Casualty. She holds a bachelor's degree in business administration from the Illinois Institute of Technology and an executive M.B.A. from Northwestern University. In addition, she serves as president of ACE Women's Forum (AWF), a company-supported women's networking and mentoring initiative of the ACE Group.

Michael C. Liss is national partner—Midwest region for Willis North America and oversees the retail insurance brokerage operations of 10 offices and 750 associates. His leadership role includes working closely with company offices and management teams to successfully align resources to deliver quality solutions to clients. Liss is based in Chicago's Willis Tower, the hub for Willis North America's Midwest operations. Since joining Willis in 2006, Liss has served in several leadership positions. First, as a regional partner he oversaw the Chicago and Milwaukee operations and, after the HRH acquisition in 2008, he successfully integrated four Chicago-area offices into the Willis Tower. He was named national partner in October 2011. A 29-year industry veteran, his background includes executive positions with Wachovia, Marsh USA, and The Hartford Group. His industry expertise is in risk management casualty with a focus on reducing a client's total cost of risk.

Richard Rabs is vice president-insurance and risk, for Veolia Environment North America. He has nearly 30 years of risk and claims management experience. Prior to his current appointment, where he is responsible for combining and leading the risk efforts of the Veolia North American businesses, he spent nine years heading risk and claims for Veolia's North American transportation group currently under divestment. Before Rabs' employment with Veolia, he held field and corporate management positions for an insurance company, a third-party administrator, and a national broker. He has also led an online claims course for the American Institute for Chartered Property Casualty Underwriters (AICPCU) and taught for the Insurance School of Chicago. He earned his B.A. in journalism from Marquette University and holds associate in claims (AIC) and associate in risk management (ARM) designations from the Insurance Institute of America. Rabs is a member of the Risk and Insurance Management Society (RIMS) where he chairs the External Affairs Committee. He is also a current and founding trustee of RiskPAC, RIMS' political action committee.

Howard L. Rosen is a senior director of financial services ratings and an enterprise risk management (ERM) specialist responsible for ERM analysis in the U.S at Standard & Poor's (S&P). He manages the U.S. ERM team's activities, particularly in support of new criteria development, the analysis of insurers' ERM, and the reviews of economic capital models. Prior to joining S&P, Howard was the chief insurance risk officer and chief actuary for ING's U.S. retail life insurance business. Before that, he served in various capacities within the insurance industry including five years as an individual disability income product manager and 12 years as a consultant for a global accounting firm. He has been published on various topics and is a frequent speaker at industry events. Rosen is a Fellow of the Society of Actuaries, a member of the American Academy of Actuaries, and a chartered enterprise risk analyst. He received his B.S. in mathematics from the University of Maryland and his M.S. in actuarial science from Northeastern University.

A. Morris "Mo" Tooker is an executive vice president of General Reinsurance Corp. (Gen Re) and is responsible for the company's direct global treaty business. During his 21 years with Gen Re, Tooker has served in a variety of marketing, underwriting, and leadership roles nationally and internationally with the facultative division. Most recently, he was responsible for the global property facultative unit, which specializes in marketing and underwriting property, energy, and marine facultative. Tooker is a graduate of Middlebury College and holds bachelor's degrees in both economics and environmental studies.

Katie School highlights

- One of the largest undergraduate programs in insurance and risk management in the U.S.
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- Redbird Risk Management Challenge for High School Students
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- Domestic and international student internship program
- Gamma Iota Sigma insurance fraternity chapter
- Student involvement in industry conferences
- Spencer Educational Foundation Scholar recipients
- Anita Benedetti Student Involvement Program participants
- Angus Robinson Jr. Memorial Scholarship winners
- Derek Hughes/NAPSLO Educational Foundation Scholarship recipients
- Association of Professional Insurance Women Scholarship recipients
- The Council of Insurance Agents and Brokers (CIAB) FAME Scholars
- More than \$100,000 awarded in scholarships annually

Registration and payment information

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Register me/our group for the 23rd Annual Insurance Executive Forum

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Cancellation policy

Cancellations received in writing or by phone on or before **October 1, 2013**, will receive a refund of the registration fee less a \$25 processing fee. Refunds will be processed after the seminar. **After October 1, 2013, no refunds will be issued.** Attendee substitutions may be made at any time.

Suggest a question for the panel:

Return this form to



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